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ANNUAL REPORT 1979-1980



Government
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Industry, Trade
and Commerce

Industrie
et Commerce



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Department of Industry, Trade and Commerce

ANNUAL REPORT

1979 - 80



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OTTAWA

The Honourable Herb Gray
Minister of Industry, Trade and Commerce
Ottawa, Ontario

Dear Sir:

I have the honour to submit the annual report of the Department of Industry, Trade and Commerce covering the activities during the period April 1, 1979 to March 31, 1980.

Respectfully submitted



Robert Johnstone
Deputy Minister

OTTAWA

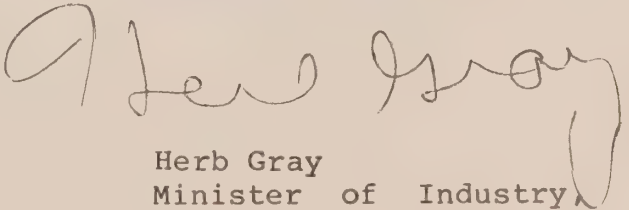
To His Excellency
The Right Honourable Edward Schreyer, C.C.
Governor General of Canada

May it please your Excellency:

I have the honour to submit to your Excellency the annual report for the Department of Industry, Trade and Commerce covering the period April 1, 1979 to March 31, 1980.

A summary of the Department's policies, activities and services is laid before Your Excellency.

Respectfully submitted



Herb Gray
Minister of Industry,
Trade and Commerce

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HIGHLIGHTS

The Department of Industry, Trade and Commerce carried out a vigorous program in its promotion of Canadian goods and services abroad during fiscal year 1979-80. During the year:

Canadian exports totalled \$65.2 billion during 1979 while imports were \$61.2 billion for a record \$4.0 billion surplus in merchandise trade. The value of Canadian exports increased by about 24 per cent.

Approximately 300 Canadian business-people took part in 29 IT&C sponsored trade missions to 24 countries. Participation by 785 companies was organized in 62 trade shows that produced on-site sales for Canada of \$44 million.

Total employment in the manufacturing sector broke through the two million level for the first time ever. An average of 115,000 more people were employed in 1979 than in 1978.

The Multilateral Trade Negotiations (MTN) were brought to a successful conclusion in 1979, marking an important step towards larger trade and more specified production in Canada, and contributing to the development of a more rational, efficient and competitive industrial structure.

Canada's tourism deficit decrea-

sed by 37 per cent from \$1.7 billion in 1978 to \$1.1 billion in 1979, as a record 30 million Americans and two million overseas tourists visited Canada.

* Canadian exports to Eastern Europe increased by 30.6 per cent in 1979 to a record level of \$1.2 billion. Exports to Western Europe were up 51.1 per cent to \$8.3 billion.

* A total of \$150.3 million, provided in the form of adjustment assistance loan guarantees, went to 144 firms through the Enterprise Development Program (EDP). The same program provided \$69 million in loan insurance for loans to 137 manufacturing firms.

* The Program for Export Market Development (PEMD) was extended to cover market identification in the U.S. and incoming buyers missions from that country. Two new features were added to PEMD: sustained export market development and export market development assistance for agriculture, fisheries and food products.

* In excess of 11,500 loans, valued at more than \$280 million, were made to small businesses under the Small Businesses Loans Act.

* Trade missions led by Ministers went to Colombia, Ecuador, Peru, Argentina, Brazil and a number of African countries.

ENTERPRISE DEVELOPMENT

Programs

Enterprise Development Program

The Enterprise Development Program, designed for all businesses but primarily used by small to medium-size enterprises, provided assistance to manufacturing and processing firms to help increase their viability and international competitiveness. The program encourages innovation in the design and development of new or improved products or processes, and helps companies adjust to changing circumstances.

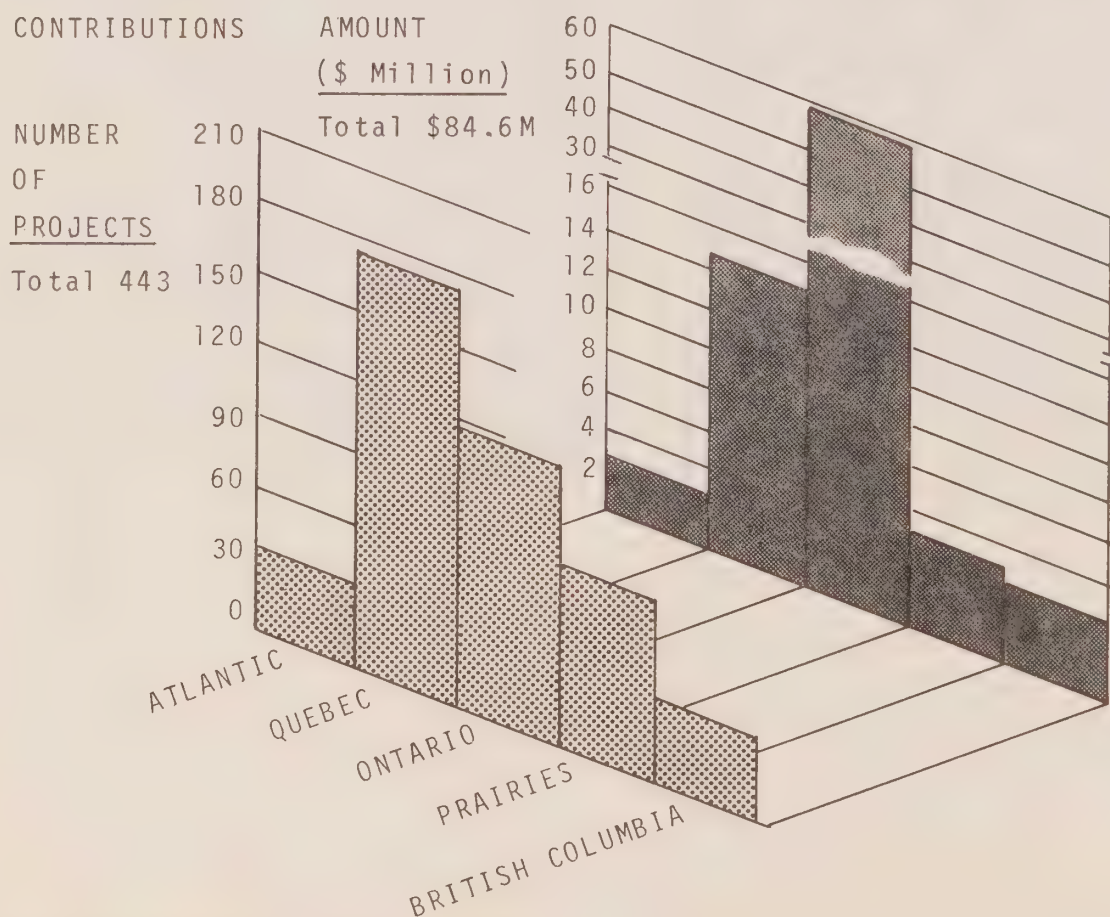
The program is administered by the Central Enterprise Development

Board and 10 regional boards. While these boards have different levels of authority, firms with annual sales of less than \$5 million can receive up to \$200,000.

During the year under review, the central and regional boards authorized 144 adjustment assistance loan guarantees valued at \$150.3 million. They also provided \$84.6 million in contributions toward the cost of 443 innovation and product development projects.

Innovation projects covered a wide industrial spectrum including machinery, electronic instruments, ship components, communication equipment, automotive vehicles and parts, building components, tex-

Expenditures Under the Enterprise Development Program, by Region 1979-80



iles, sporting goods and various chemical processes.

A total of \$5 million was approved for 180 projects involving productivity improvement, industrial design capability and consulting assistance in developing restructuring proposals. Regional boards approved 152 of these projects, valued at \$4 million.

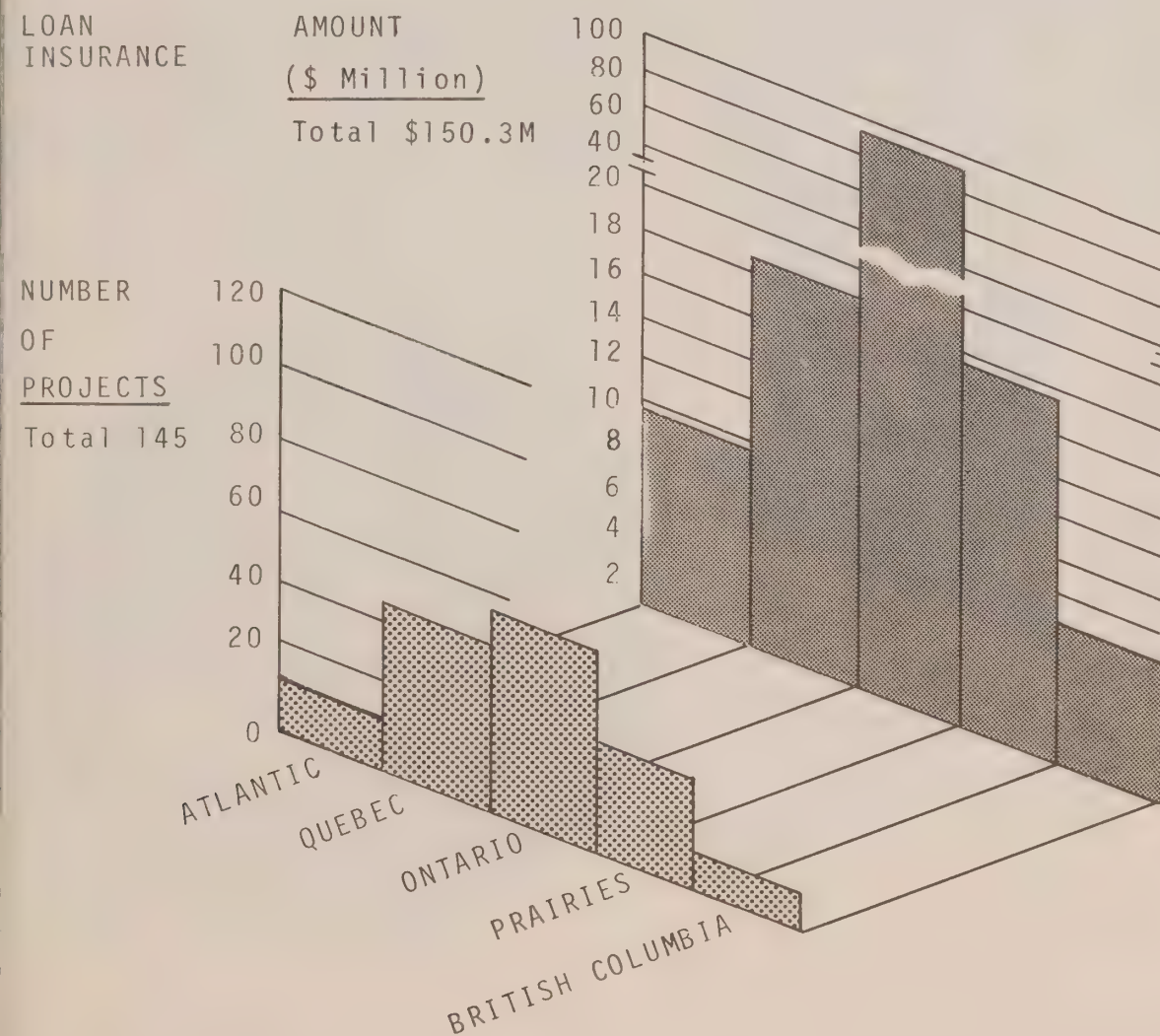
Insurance of \$69 million was authorized for loans made to 137 manufacturing firms by private lenders.

Regional boards authorized 78 of these loans, valued at \$9 million.

The program provided \$82 million in insurance to help finance sales of the Dash-7 aircraft.

Because of EDP loan insurance, an estimated 3,125 new jobs were created. Estimates are that projects receiving assistance during the year will produce sales of \$4.42 billion, and 11,950 jobs over the next five years.

Expenditures Under the Enterprise Development Program, by Region 1979-80



Export Market Development Program

The Program for Export Market Development (PEMD) helped develop and increase the export of Canadian goods and services by sharing with the business community the financial risks of entering foreign markets.

The program's five sections cover specific product bidding, market identification, participation in trade fairs, incoming buyers, and formation of export consortia. Effective April 1, 1979, the sections providing support for market identification and incoming buyers were made available for activities directed towards the United States. New sections added to the program during the year covered sustained export market development, export markets for agriculture, fisheries and food products and contributions to non-profit organizations. Sustained export market development provides support for the develop-

ment of market penetration plan and the implementation of approved activities by companies seeking to become established in a foreign market. Export market development assistance for agriculture, fisheries and food products consolidates all previous PEMD support for the food industry, and covers export marketing activities previously supported by the Agriculture and Grain Marketing Assistance Program and the Grain and Oil Seed Marketing Incentives Program.

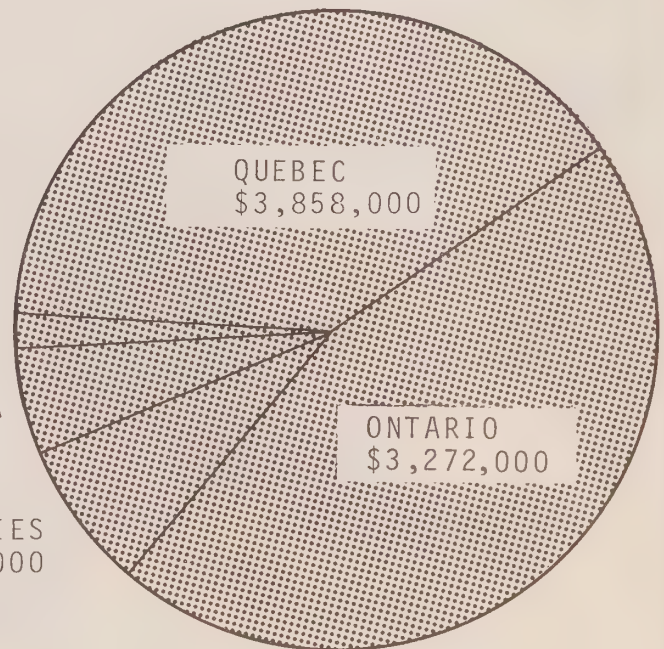
During the year, PEMD assistance of \$20.1 million was approved, and \$8.9 million was paid out as compared to \$16.5 million approved and \$7.1 million paid out in the previous year.

Companies reported that PEMD assistance helped produce \$500 million of export sales bringing to \$4.1 billion the amount of exports generated with PEMD assistance since the program was started in 1971.

EXPENDITURES UNDER THE PROGRAM FOR EXPORT MARKET DEVELOPMENT FISCAL YEAR 1979-80

TOTAL \$8,856,000

ATLANTIC
\$229,000
BRITISH COLUMBIA
\$625,000
PRAIRIES
\$872,000



Small Businesses Loans Act

During the year, 11,523 loans for \$284,852,265 were made under the Small Businesses Loans Act, compared to 7,844 loans for \$190,074,576 during 1978-79.

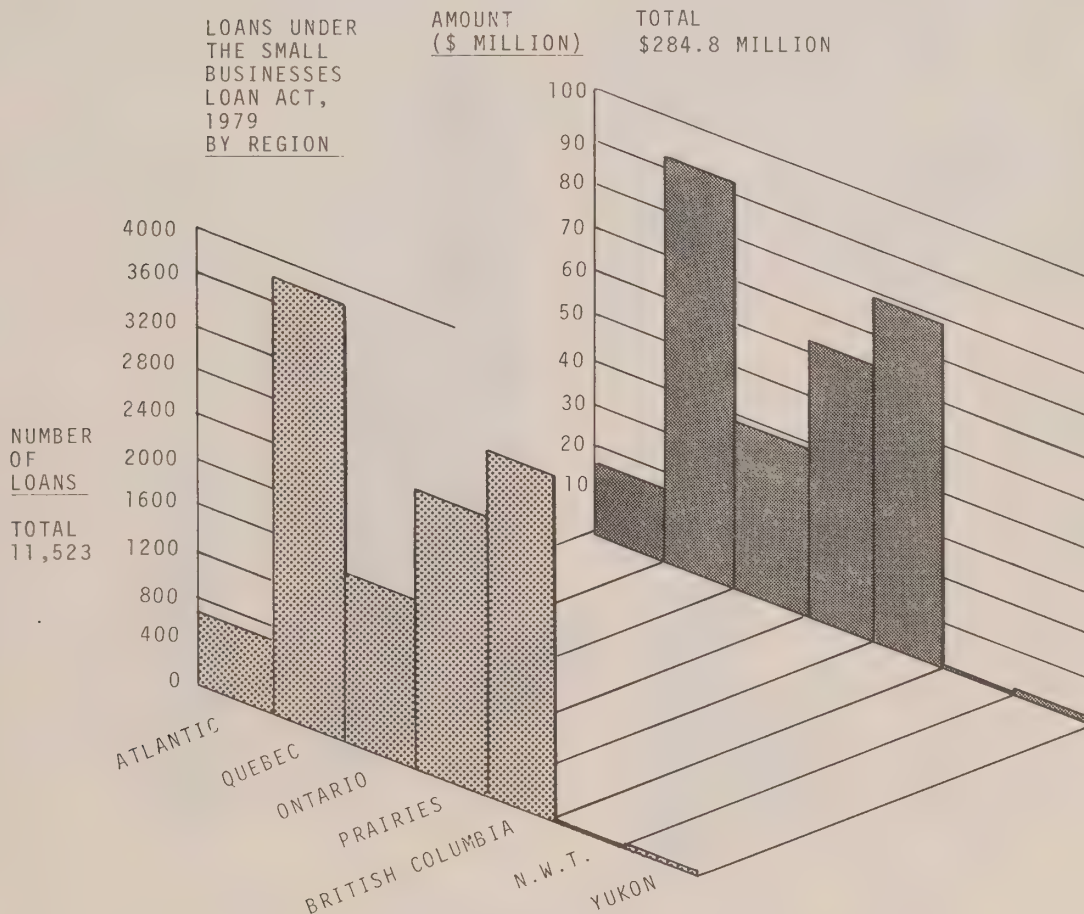
The program encourages lenders in the private sector to make term loans available to small Canadian businesses for a wide variety of capital improvements. The loans, guaranteed by the federal government, bear maximum interest rates of bank prime plus one per

cent. The maximum term is 10 years.

Defence Industry Productivity Program

The Defence Industry Productivity Program (DIPP) helped develop and sustain the technological capability of the Canadian defence industry, thereby generating exports.

It operates under international agreements for defence development and production sharing.



A total of 74 projects, generating sales of \$889 million, were completed under DIPP during the year. There were program expenditures of \$57.9 million and 66 projects were contracted. Sixty per cent of the sales generated under the program were in the defence export market, while 40 per cent were related civil exports. Approximately 85 per cent of defence sales were to foreign markets.

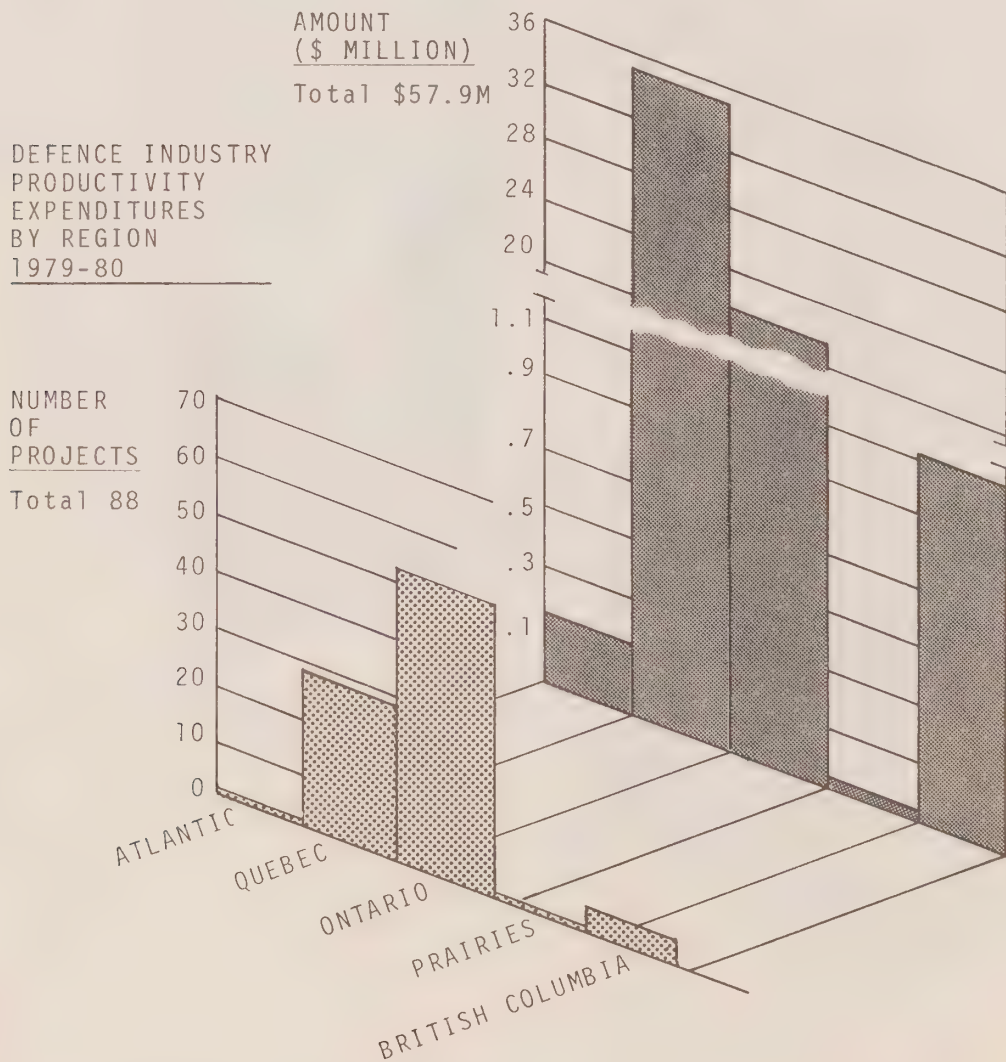
Industry Energy Research and Development Program

The Industry Energy Research and Development Program (IERD), introduced in October, 1977, assisted

Canadian industry with research and development of new and improved processes and equipment to reduce industrial energy consumption. The program also helped promote and market this technology.

Since its inception, 11 projects requiring total funding of \$2,021,400 have been approved. In 1979-80, \$247,800 was expended under IERD. The program, which normally contributes up to 50 per cent of the estimated costs, operates within a \$1.5 million annual budget.

Projects undertaken include development of new technology in steel



oaking pits, the use of coal dust waste to replace other fuels, use of waste heat in paper machines to reduce total consumption of energy, and the use of paint solvent as fuel in drying ovens.

Small Business

The Small Business Secretariat, the focal point for small business issues, developed and assessed national policies and programs affecting SME's.

The Small Business Intern Program, which resulted in approximately 1,500 jobs in the small business sector, concluded at the end of 1979-80. Funding was provided through the Canada Employment and Immigration Commission's (CEIC) Canada Works Economic Growth component.

The new Business Associations Program, with funding from CEIC's Youth Job Corps Program, was instituted in nine provinces in April, 1979. The program helped create jobs for 130 university and college graduates in business associations across the country, representing nine areas of industry or trade responsibility. Work performed included research, market studies, statistical analysis, administrative and clerical duties.

The second edition of New Statistics on Small Business in Canada (1979) was published for professional researchers, with a new publication, Small Business in Canada: A Statistical Profile, aimed at a general audience. Approximately 10,000 people have received these publications.

In addition, a survey of management courses offered at post-secondary institutions across Canada was

conducted and the results published for industry's use. Approximately 600 courses were catalogued, and the educational activities of other institutions and trade associations were examined.

The first issue of the quarterly newsletter "Small Business World" was published in the spring of 1979. Containing information on government policies and legislation impacting on small business, it was distributed to business associations, universities, banks and IT&C regional offices.

The Secretariat helped support the federal government's Canadian Business Sub-Contracting Opportunities Program in cooperation with the Department of Supply and Services. Initially proposed in 1978, the program has been the subject of extensive negotiations encouraging the 50 largest suppliers of the government to award subcontracts to Canadian companies. Small businesses, especially in the area of high technology, are expected to be the prime benefactors of the program.

Financial Institutions and Corporate Liaison

The Financial Institutions and Corporate Liaison Branch studied financial institutions, markets and instruments involved in achieving departmental objectives.

The branch was the focal point for studies on the competitiveness of Canadian export financing, and represented the department in a series of international meetings on this subject.

The branch advises the department on financial Crown corporations, other Crown corporations, financial

institutions, and financial trends, structures and activities of Canadian industry.

Administrative Services

Progress continued during the year towards optimizing centralized administrative services to the department's activities at Headquarters and in the Regional Offices.

Major activities included:

- establishment of three additional word processing centres, bringing the number to eight;
- revision of procedures and forms for transmission of telecommunications to coincide with the installation of an Optical Character Recognition (OCR) reader;
- introduction of a new system designed to monitor the correspondence to the department's Ministers through the combination of micrographics and electronic data processing techniques.

A study of the department's office accommodation needs was done under contract with the Bureau of Management Consulting (DSS).

TRADE COMMISSIONER SERVICE & INTERNATIONAL MARKETING

Office of Overseas Projects

The Office of Overseas Projects, which assists Canadian companies seeking contracts for capital projects abroad, concentrated its activities in the lesser developed countries where fully-integrated projects are most often required. Foreign projects were identified and Canadian industry assisted in responding to these opportunities. The Office encouraged industry to form consortia, provided assistance and advice in assembling competitive financing proposals and mobilized the support of the federal government in the pursuit of overseas projects.

The Office coordinated the operational aspects of export financing with the Export Development Corporation, the Canadian International Development Agency, the World Bank, the Inter-American Development Bank, and various other regional banks and financing institutions. Competitive and special financing mechanisms were arranged for Canadian exporters. Recent examples of successes in this activity were the Iralaya thermal power plant project in Indonesia, worth approximately \$200 million, and the Luzomberok bleached pulp mill project in Czechoslovakia, valued at \$300 million.

Agreements negotiated under the technical assistance program designed to provide public sector expertise on a cost recoverable basis to improve Canada's export marketing performance provided for two airports and a prison complex for the Government of Trinidad and Tobago.

Promotional Projects

The Promotional Projects Program spent \$6.5 million in 1979-80 to promote the sale of Canadian goods and services abroad.

The program helped 785 companies participate in 62 trade exhibits. Information booths were set up at another 17 trade fairs. On-site Canadian sales from these shows were estimated at \$44 million, while follow-up sales should reach \$1,450 million.

Approximately 300 Canadian businessmen participated in 29 ITC-sponsored trade missions to 24 countries. As well, 892 foreign businessmen, government officials, buyers and trade delegates from 43 countries were brought to Canada.

Defence Programs

Canada continued to work with her allies primarily through cooperative defence research, development and production (RDP) agreements.

Meetings held under the Canada-United States Defence Production and Development Sharing Arrangement resulted in the formation of new working groups to enhance trade with the U.S. military and defence contractors.

Regular RDP meetings were held with the governments of Britain, France, Italy, Norway, Sweden, the Federal Republic of Germany and the Netherlands. Increased emphasis was given to promoting direct industry-to-industry contacts between Canada and NATO nations. Resulting defence cooperative efforts and programs, many of which have commercial application, related to high technology areas such as transport aircraft, aircraft engines and parts, flight simulators and navigation and communication equipment.

Defence trade programs were developed with a number of non-NATO friendly countries. These ranged from participation in a High Technology Conference in Japan to export opportunities to countries like Egypt, India, Indonesia, Malaysia and Morocco.

Canadian defence export contracts amounted to \$556.1 million, while Canadian imports of defence equipment totalled \$409.1 million.

Trade Commissioner Service and Canadian Regional Offices

Trade Commissioner Service and Canadian Regional Offices maintained 11 regional offices in Canada and 89 posts in 66 foreign countries during 1979-80.

De-centralization significantly improved access to the broad range of trade and industrial development programs offered by the department. The regional offices continued to serve as a focal point for the department's relations with provincial governments.

The 10 Business Information Centres, which provided information on business assistance programs of the federal and provincial governments, received 80,000 enquiries and 4,200 visitors during 1979-80.

The posts continued to play a significant role in trade relations, trade policy and export development by identifying export opportunities and assisting Canadian firms to exploit these opportunities.

Close to 120,000 enquiries were processed by the posts during the year, and assistance was provided to more than 26,000 visitors. In excess of 2,200 new buying connections and 1,500 agency agreements resulted.

Export Canada '79

Export Canada '79, a new one year program to assist small and medium size companies to penetrate the United States market for the first time or to expand their current export activities in the U.S., was estimated to have increased sales to the U.S. by some \$50 million in the year under review. The program, recommended in a special departmental task force report, was funded by \$1.6 million arranged through the Ministry of State for Economic Development.

The program attracted about 850 firms to a series of 44 in-depth educational workshops designed to prepare first-time exporters for business in the U.S., and to inform business communities on the importance of exports to the Canadian economy. The workshops were held in small and large centres across the country.

The program made wide use of trade events which had potential for increased exports to the U.S. by small and medium size companies. The department, provincial governments and industry helped Export Canada '79 identify a number of smaller regional trade events particularly suited to the objectives and capabilities of smaller firms. These included:

Empire Farm Days in Syracuse, New York, where nine Canadian manufacturers of agricultural equipment generated on-site sales of \$70,000 with projected sales of almost \$2 million;

the Canadian Outerwear Fashion Fair (COFF) in Winnipeg, attended by an incoming mission of approximately 200 U.S. buyers;

the High Technology Marketplace in Boston which attracted more than 100 U.S. buyers. Ninety-seven companies from eight provinces attended this solo trade fair, making it the largest solo Canadian trade promotion event ever organized by the department abroad.

Several regionally focused activities of Export Canada '79 have been integrated into the department's ongoing Trade Fairs and Missions program.

INTERNATIONAL TRADE RELATIONS

Office of General Relations

The multilateral Trade Negotiations (MTN) were brought to a successful conclusion in 1979, marking an important step toward larger scale and more specialized production in Canada. This is expected to contribute to the development of a more rational, efficient and competitive industrial structure.

The conclusion of MTN was marked by the signing of a number of agreements in December, including the Tariff Protocol Agreement and the Agreement on Trade in Civil Aircraft. In addition, several non-tariff measure agreements were signed, including Technical Barriers to Trade, Subsidies and Countervailing Duties, Antidumping, Customs Valuation and Import Licensing Procedures.

Implementation of the MTN agreements should simplify and liberalize international trade.

General Trade Relations

Canadian trade policies were coordinated to current and potential implications of major developments in international policy and practice. Areas of activity included the MTN, North-South relations and federal-provincial trade policy consultations.

Canada participated actively in international policy coordination efforts at both the general and sector-specific levels. General issues raised included export financing, transportation, northern development, competition policy and transfer of technology. Discussions were held on problems and developments in such sectors as motor

vehicles, steel, ocean industries, urban mass transit equipment, energy and minerals.

Commodity Trade Relations

Canada participated in the successful negotiation of a new International Natural Rubber Agreement and in preparatory meetings for international agreements on copper, tea, tungsten, tropical timber, jute and hard fibres.

International Agreements on sugar, tin, cocoa and coffee continued in effect. Canadian participation was directed at fulfilling obligations and protecting Canada's interests as a consumer member.

In addition, agricultural aspects of the GATT MTN were concluded. However, accord was not reached on a new International Wheat Agreement, and discussions will continue into 1980-81.

Eastern Europe

Canadian exports to Eastern Europe increased by 30.6 per cent in 1979 to a record level of \$1.2 billion. Imports increased by 29.9 per cent to \$327 million, leaving Canada with a positive trade balance of \$877 million.

Grain sales to Poland and the Soviet Union again dominated exports to the area, with sales in the Food, Feed, Beverages and Tobacco category accounting for 53.7 per cent of total exports. The U.S.S.R. remained Canada's major trading partner in the region, absorbing 63.4 per cent of Canada's exports. Trade relations with the Soviet Union were affected by decisions to limit political and economic relations as a result of the U.S.S.R. invasion of Afghanistan.

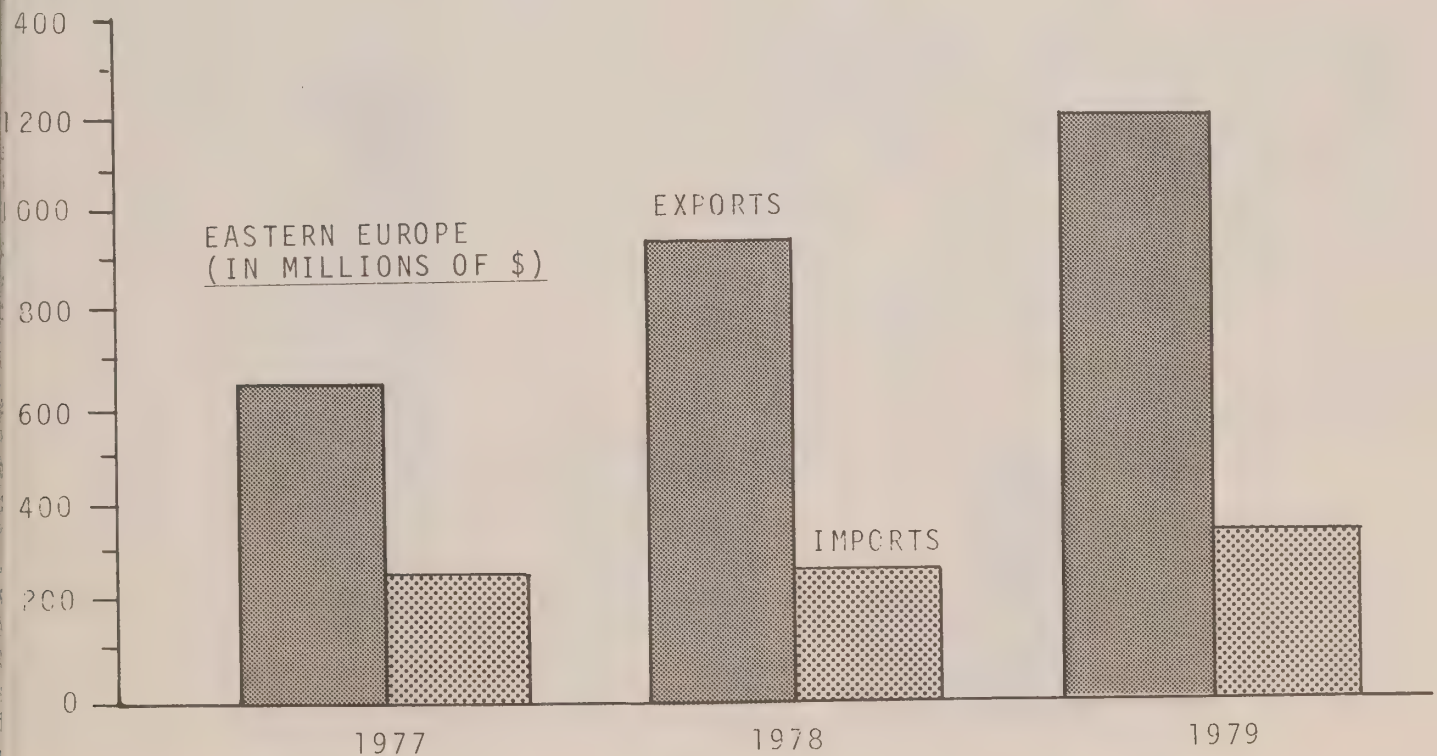
ilateral trade consultations were held with Eastern European countries, including Poland, Romania and Bulgaria. The Mixed Economic Commission meeting with the Soviet Union was postponed, and trade talks with Hungary were delayed until mid-1980.

The fifth Long Term Grain Agreement between Canada and Poland, which calls for annual deliveries of between 1.1 and 1.5 million tonnes from 1980 to 1982 inclusive, was signed in Warsaw.

Atomic Energy of Canada Ltd. (AECL) promoted the CANDU nuclear power system in Yugoslavia, which is expected to make a final decision in

1981 regarding a nuclear power program. Success with Yugoslavia would complement earlier contracts signed with Romania that took effect May 11, 1979.

The department sponsored information booths at trade fairs in Czechoslovakia, Poland, Yugoslavia and the German Democratic Republic. A full-scale promotion was staged for Lesdrevmash, the forestry equipment show in the Soviet Union. Trade missions to Canada during the year included visits by the Czechoslovak Minister of Industry, and representatives of the Yugoslav forestry industry and Hungarian rapeseed industry.



Western Europe

Canadian exports to Western Europe rose by 51.1 per cent to \$8.3 billion in 1979 while imports increased by 19.9 per cent to \$6.8 billion. Britain continued to be Canada's largest market in Europe accounting for 31.2 per cent of total exports to that region.

The European Economic Community is the world's largest trading entity and Canada's second-largest trading partner. In 1979, Canadian sales to the Community rose to \$5.6 billion.

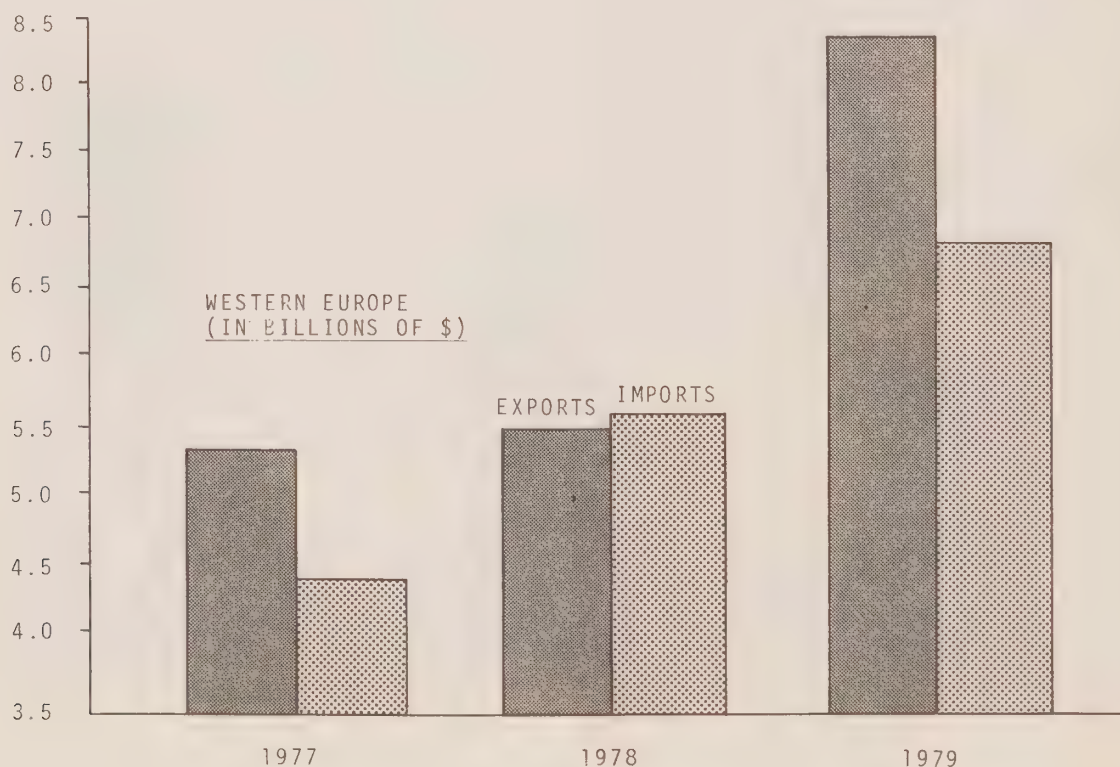
Canadian trade with other Western European countries continued to grow with exports rising from \$642 million in 1978 to \$1.1 billion in 1979. Imports increased from \$1.0 billion to \$1.2 billion.

A major objective of the department is development and maintenance of a favourable environment for the expansion and diversification of Canadian business links with the area. With the conclusion of the Multilateral Trade Negotiations (MTN), communication of the results became an important responsibility.

The department's European activities were concentrated in three broad areas: economic cooperation, market access and export promotion.

1) Economic Cooperation

A wide range of activities continued under the Framework Agreement with the European Economic Community. A number of working groups of businessmen and officials from Canada and the E.E.C. explored possibilities for cooperation in speci-



ic industrial sectors, such as aerospace, peri-informatics and telecommunications. Industrial cooperation activity continued between Canadian scientists and their counterparts from Sweden and Finland, and between Canadian and Norwegian companies in the field of offshore oil and gas exploration.

2) Market Access

Identification of export opportunities with the E.E.C., Norway, Sweden, Finland, Austria, Switzerland and other Western European countries intensified as the Multilateral Trade Negotiations concluded. In conjunction with the Trade Commissioner Posts, the department began to notify Canadian industry of the improved terms of access, and of the provisions of the various codes of behaviour that had been negotiated. Discussions took place with the E.E.C. on problems facing such specific Canadian exports as seed corn and potatoes, grain screenings, newsprint, pork, timothy seed and steel products. Several matters affecting access of Canadian exports were raised with the E.E.C. and individual countries concerning products such as cheese, high quality beef, feeder calves, synthetic textiles, sealskins and fish.

3) Export Promotion

Thirty-five trade fairs were attended in the area during the year and 17 incoming and outgoing trade missions were arranged. Some 53 per cent of the department's total promotional projects budget was spent in this area. PEMD reviewed 729 applications for projects concerned with Europe. Meetings were held with the E.E.C., separate members

of the E.E.C. and other countries during the year, including the semi-annual consultations with the E.E.C. Commission in Brussels and Ottawa, and the Canada/U.K. Continuing Committee. The department serviced missions from Germany and Holland, and an incoming industrial cooperation mission of senior business executives from Italy.

Western Hemisphere

United States

Two-way trade between Canada and the United States expanded to nearly \$90 billion in 1979, as compared to \$72 billion in 1978. Exports were \$44.5 billion while imports were \$45.4 billion, leaving a deficit of \$897 million. The balance of payments deficit on current accounts in 1979 was \$7.64 billion, of which tourism accounted for \$581 million.

On January 1, 1980, the first of eight annual reductions were made in customs duties on most U.S. tariff items negotiated in the GATT Tokyo Round. The implementation of tariff cuts achieved in the Tokyo Round, together with non-tariff barrier codes, will further free cross-border trade with the U.S. through the 1980's.

The import quota on specialty steels into the U.S. was extended a further eight months to February 14, 1980.

Bilateral discussions continued on U.S. tax laws relating to attendance by U.S. citizens at conventions held outside the United States. This was a matter of ongoing concern to the Canadian convention industry.

The U.S. Division continued to work closely with Canadian exporters, providing information and assistance regarding market access to the U.S. Tariff classification rulings for exporters were obtained from U.S. Customs, and advice

provided on labelling, food and drug and other non-tariff regulations. The division participated in export seminars and workshops organized by the department, provincial governments and private sector organizations.



Latin America

Canadian exports to Latin America totalled \$1.9 billion in 1979, an increase of 16 per cent over 1978. Almost 40 per cent of this trade comprised fully manufactured products. The four principal markets of Venezuela, Brazil, Argentina and Mexico accounted for 84 per cent of Canadian sales to the region.

Visits by senior officials during the year reflected the increasing importance attached to Canada's commercial relations with Latin American countries. For example:

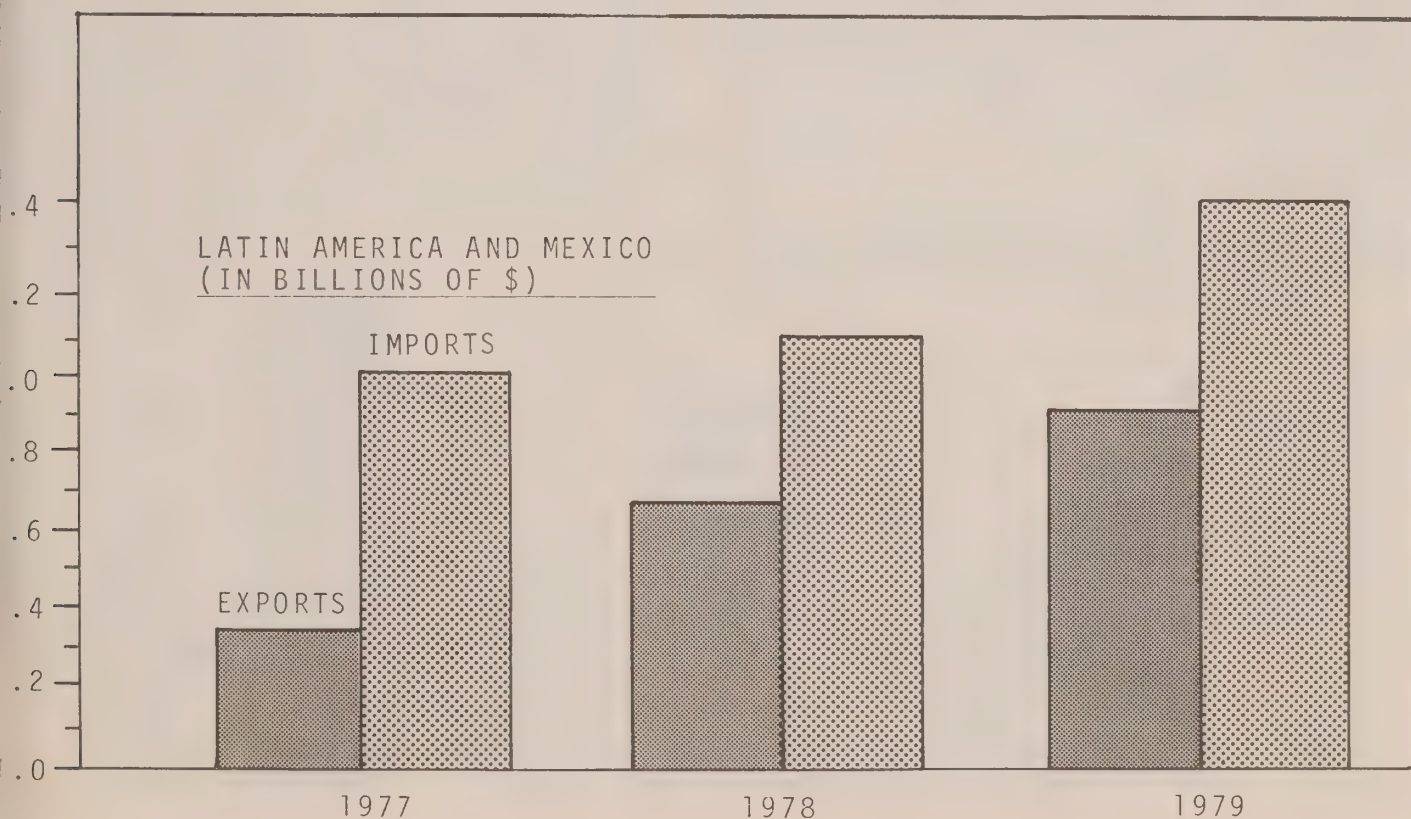
the Minister of State for International Trade visited Columbia, Ecuador, Peru and Argentina;

the Minister responsible for the Canadian Wheat Board went to Brazil to sign a new three-year wheat sales agreement with that country;

- senior Mexican officials visited Canada following the signing of an industrial cooperation agreement in May, 1979; and

- technical missions were organized to Colombia and Ecuador to identify sectors and projects offering potential for Canadian exports.

The activities of the Canadian Association-Latin America and Caribbean (CALA) and the Brazil-Canada Chamber of Commerce continued to complement the department's trade development efforts. The CALA VII Conference in Calgary, which attracted more than 350 delegates, included representatives from most Latin American countries. The department again organized a meeting between representatives of CALA and the Chamber and senior government officials to exchange views on various aspects of Canada's relations with Latin American countries.



Caribbean and Central America

Canadian exports to the Caribbean and Central America increased by 25 per cent in 1979 to \$931 million. Cuba (\$257 million), Trinidad (\$126 million) and Puerto Rico (\$110 million) continued to be the biggest markets.

The first meeting of the Canada-Caribbean Community (CARICOM) Joint Trade and Economic Committee took place in Ottawa in November, 1979.

The department-organized Canadian textile exhibition in Trinidad produced record high on-site sales of \$2.3 million. Similar exhibitions were organized for the first time in Barbados and Panama.

The department participated in a CALA trade mission to Cuba and sponsored a mission of representatives from steel and construction firms to the Caribbean. Trade missions comprising electrical utility officials from Central America and rail and urban transport officials from Costa Rica were also sponsored by the department.

Canadian construction and engineering firms obtained major contracts in Trinidad and Costa Rica, while significant gains were achieved in the sale of food commodities, machinery, electrical equipment and forest products.

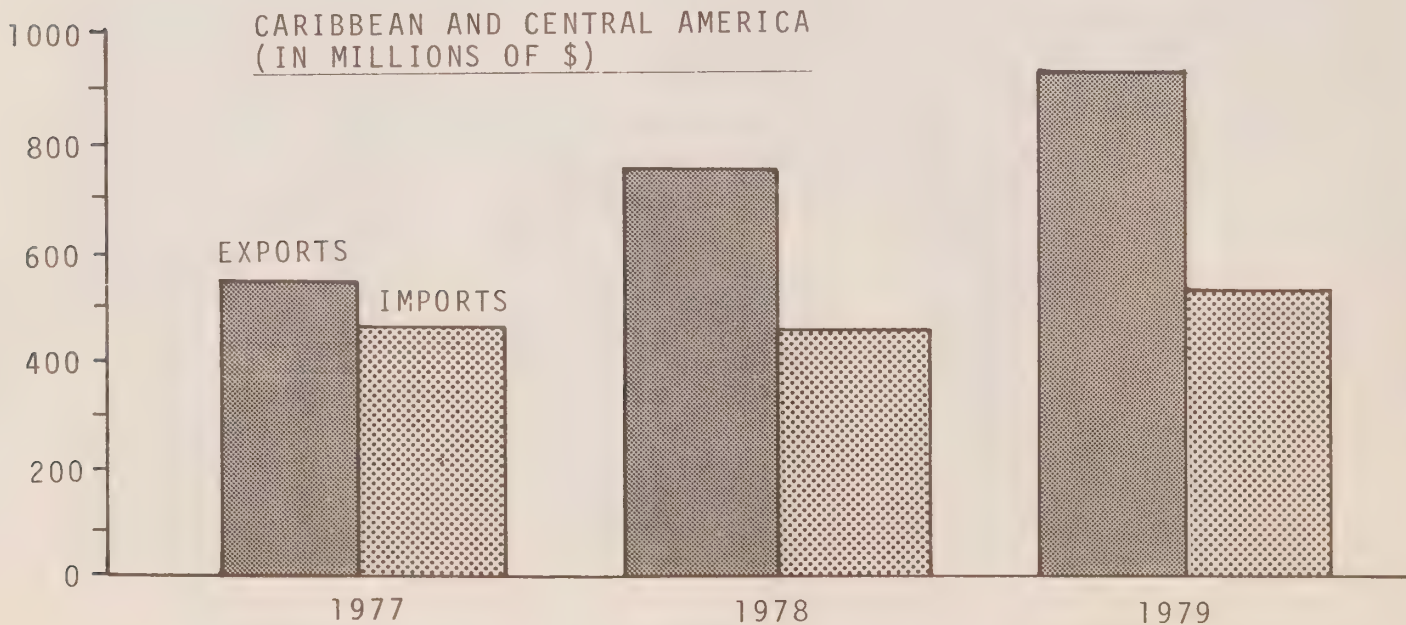
Africa and the Middle East

Africa

Canada's trade and industrial relations with Africa continued to improve in 1979 as exports rose to \$872 million and imports to \$491 million. Algeria continued to be the largest single market, absorbing \$215 million in Canadian exports.

The department sponsored trade missions, some involving ministers to African countries, and participated at trade fairs in Algeria and Morocco. The department also helped prepare provincial trade missions to Africa.

New trade commissioner offices were opened in Senegal and Tunisia, a trade office in Cameroon and the office in Zambia was moved to Zimbabwe.



Middle East

Canadian exports to the Middle East rose to \$607.5 million in 1979, compared with \$601.5 million the previous year.

The department participated at the Baghdad International Trade Fair in Iraq and the Izmer International Trade Fair in Turkey.

Plans were made during the fiscal year for the third meeting of the Canada/Saudi Arabia Joint Trade and Economic Committee to be held in Ottawa in June, 1980.

Asia and the Pacific

Asia

Canadian exports to Asia increased to \$2.04 billion in 1979, a rise of approximately 17.5 per cent over the \$1.74 billion achieved in 1978. The People's Republic of China continued to be the largest market, absorbing 29 per cent of Canadian exports to the region. Other major buyers were Korea, India, Hong Kong and Taiwan. Significant increases were achieved in exports to Korea, Singapore, Hong Kong and Malaysia. Imports from the region increased by 37 per cent from \$1.6 billion in 1978 to \$2.1 billion in 1979.

The sixth meeting of the Canada/China Joint Trade Committee was held in Ottawa in April, 1979. In May, the Export Development Corporation (EDC) signed a memorandum of understanding in Peking providing China with a \$2 billion line of credit over five years to cover the purchase of Canadian goods and services. It was the largest line of credit ever offered by the EDC.

China's Minister of Foreign Trade visited Canada with a delegation of

senior officials in October. During this visit, the Canada/China Trade Agreement was renewed, and an Economic Cooperation Protocol to the Agreement was signed.

The Governor of Hong Kong and the Prime Minister of Thailand visited Canada during the year to discuss trade.

Trade potential with India was enhanced by a visit to Canada of members of the Federation of Indian Chambers of Commerce and Industry. A seminar on India was held in Toronto by the Canadian Manufacturers' Association.

The first sale was completed of Canadian thermal coal to Korea. It involved the supply of 3.8 million tons over five years.

Pacific

Canadian exports to the Pacific region increased by 33 per cent from \$3.5 billion in 1978 to \$4.7 billion in 1979. Imports rose by only 1.5 per cent from \$2.73 billion in 1978 to \$2.77 billion in 1979, due primarily to a four per cent decline in imports from Japan. However, Japan continued to be the major market in the region. Canadian exports to that country increased by 33 per cent over 1978, to more than \$4 billion.

Two-way trade with Australia passed the billion dollar mark for the first time. Exports increased by 35 per cent to \$559 million, and imports by 30 per cent to \$464 million. Exports to New Zealand rose by 32 per cent to \$90 million, and imports increased by 34 per cent to \$135 million.

The second annual meeting of the Canada/Japan Business Cooperation Committee, attended by more than

120 Japanese senior executives, was held in Toronto in May, 1979. Prospects and problems facing bilateral trade in various sectors were considered.

Throughout 1979, Canada hosted a number of Japanese parliamentarians and government officials interested in CANDU reactors for Japan's energy program.

Discussions were held in November, 1979, with Australian and New Zealand officials in Canberra and Wellington on the future of bilateral preferential trade arrangements.

The department mounted a series of exhibits featuring Canadian manufactured products at the Canada Trade Centre, Tokyo, and sponsored a number of trade missions in support of marketing efforts in Japan, Australia and New Zealand.

INDUSTRY AND COMMERCE DEVELOPMENT

Textile and Consumer Products

Textile Industry

The value of the Canadian dollar in international markets coupled with restraints on selective imports enabled the industry to generate significant gains in production for the year, despite recessionary indicators that appeared in the last quarter of 1979 and fully materialized in the early part of 1980. New capital expenditure increases in percentage terms exceeded that of all manufacturing for the second year in a row.

Export activity throughout the year remained exceptionally strong. The Canadian Textile Show in the Caribbean, presented with assistance from the branch, returned the highest on-site sales ever achieved, while projected sales from Canadian participation at the Australian Floor Covering Mart in Sydney exceeded \$31 million.

Plans were set forth for a renewed exhibition program in the European markets through participation in the 1980 Interstoff Fabric Exhibitions in Frankfurt.

Clothing Industry

Special measures of protection and realignment of the Canadian currency contributed to considerable improvement in the industry as employment increased during the year to 113,200. In real terms, the value of shipments increased by three per cent and the value of exports by 16 per cent over last year's performance. Imports increased two per cent.

The department provided guaranteed loan assistance totalling \$800,000 to five companies during the year. Financial assistance of \$402,000 was approved for 21 productivity feasibility studies.

With financial assistance from the department, Canadian apparel was shown at eight promotional trade shows. As a result:

- sales of \$4.5 million were generated by fur goods shown in New York City and Tokyo;
- sportswear sales of \$670,000 were generated in Munich and Las Vegas;
- a display of leisurewear and outerwear at the Canada Trade Centre in Tokyo produced sales of \$400,000;
- sales of \$210,000 were made at the International Men's Fashion Week in Cologne;
- sales of \$125,000 were generated at the Women's Wear Solo Exhibition Fashion Show in New York City;
- sales of \$3 million were realized at the Canadian Outerwear Fashion Fair in Winnipeg. Visitors to the show included 65 foreign buyers whose attendance was a project of the department.

The department continued financial support for the productivity program in the Manitoba industry, and developed a format to study the specific needs of the industry in Ontario and Quebec to establish similar programs in those provinces.

Footwear and Tanning Industries

Production, employment and profits in the footwear industry improved for the second year of the three-

year period of global quotas on leather and vinyl footwear imports.

Total footwear production increased to \$650 million from \$517 million a year earlier, and exports increased to \$42 million from \$39.8 million the previous year. Employment increased by 300 to 16,500.

High leather prices impacted negatively on the tanning industry, which showed a decline of 25 per cent in leather production for 1979 to 100 million square feet from a year earlier.

With departmental assistance, these industries participated in three major trade shows in Europe and the United States, resulting in on-site sales of more than \$2 million.

The handbag manufacturing sector increased output by 21 per cent to 6.9 million units, and increased its share of the domestic market from 35 to 40 per cent.

Fashion Office

The department applied the Canada Employment and Immigration Commission's Summer Youth Employment Program to provide 78 students of fashion design with practical work experience in the summer months. This provided training and employment opportunities to the students, and introduced 58 clothing manufacturers to the talent becoming available in Canada.

The Fashion Design Assistance Program again supported a show-case of Canadian designer fashions for men, women and children. The Women's Trend Show was extended to Winnipeg in conjunction with the Canadian Outerwear Fashion Fair.

The first issue of the magazine "Canadian Fashion-Mode", supported by the department, was well received outside Canada, leading to direct contact with manufacturers and to visits by overseas buyers.

Book Publishing Industry

Exports of Canadian books reached \$39.7 million in 1979, more than twice the level recorded in 1975, providing evidence that the department's efforts to promote export interest in the book publishing industry are bearing fruit.

The industry is producing an increasing number of books with an international appeal in terms of format and content, while publishers have a better understanding of export opportunities.

The department sponsored national stands at the Bologna Children's Book Fair in Italy, the American Booksellers Association Exhibition in Los Angeles, and the Frankfurt Book Fair in the Federal Republic of Germany. The United States absorbed 75 per cent of Canadian books exported, and the European Economic Community, 22 per cent.

The department administered the Association for the Export of Canadian Books, a non-profit organization established to provide advice and financial assistance to publishing houses.

Furniture Industry

A program of trade fairs and missions designed to encourage furniture manufacturers to establish themselves in the United States market produced considerable improvement in the export performance of Canadian made furniture.

Business furniture manufacturers presented their products to influential architects, designers and specifiers at eight shows in major American cities, and at two Canadian exhibitions attended by department-sponsored incoming visitors. Exports of business furniture to the U.S. are approaching \$100 million annually and represent about 25 per cent of Canadian production.

In the residential furniture sector, the department transferred the responsibility for the Canadian exhibit at the Southern Furniture Market in North Carolina to an industry-sponsored furniture export association. Exports of household furniture are approximately \$40 million and are increasing at a rate of 30 per cent.

Jewellery, Silverware & Giftware Industries

Departmental support concentrated on assisting sector companies to identify, investigate and exploit export markets.

Major departmental projects included:

- a series of export seminars for the Canadian Jewellers Association in preparation for an incoming buyers mission from the U.S. to the Toronto Jewellery Show;

- a solo jewellery show at the Canada Trade Centre in Tokyo with 11 participating companies registering on-site sales of \$200,000. Since the onset of this market development initiative, exports of jewellery to Japan have reached \$1 million;

- an investigation of the feasibility of seven Quebec craftsmen establishing an export consortium to market their crafts in France and Belgium.

Exports to the U.S. increased from \$5.5 million in 1979 to \$7 million in 1980.

Sporting Goods Industry

The industry continued to improve its competitiveness in the domestic and export markets, with exports accounting for almost 20 per cent of shipments.

The United States continued to be the major export market, but significant increases were recorded in Western Europe as a result of departmental-sponsored exhibits at two major European sporting goods shows, SPOGA in Cologne and ISPO in Munich. On-site Canadian sales reached \$9 million at these shows.

The department also sponsored an incoming buyers mission from Europe to the Canadian Sporting Goods Association Show in Montreal.

Chemicals

Chemicals and related industries experienced a 20 per cent increase in shipments during the year, reflecting improved international competitiveness brought about by favourable material and energy costs, and world-scale petro-chemical expansion. The trade balance continued a shift from net imports to an essentially balanced position.

The branch continued to monitor the international competitiveness of Canada's chemical industry. This included development of a technique to measure the impact that policies being considered would have on the industry's competitiveness.

The branch published a report on the study of the health care products industry, carried out in conjunction with provincial govern-

ments and industry. Along with related background studies, this report will form a basis for examining industrial development policy options.

A study on industrial development potential in the pesticides industry was initiated.

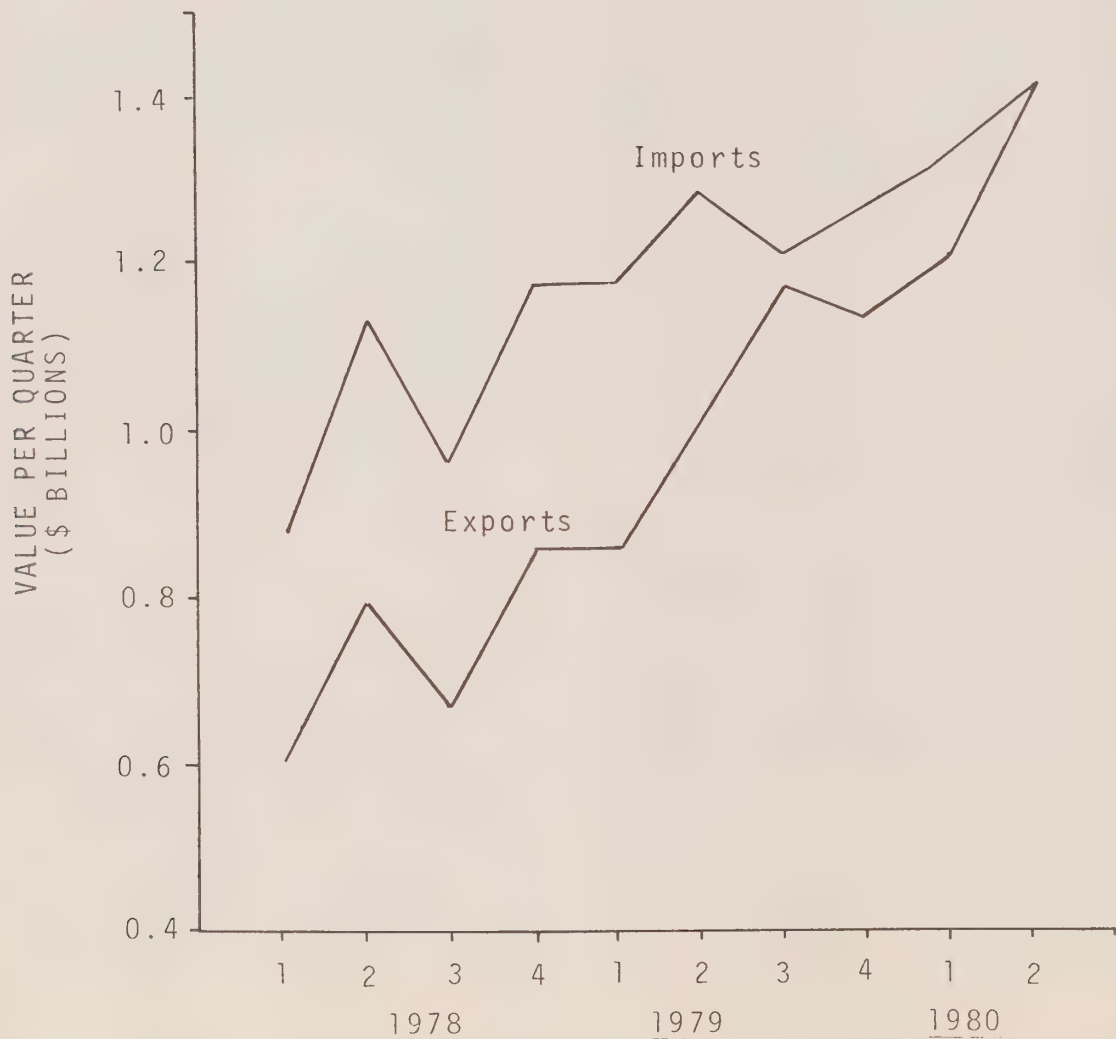
A new Health Care Products Division was formed to cover both pharmaceutical and medical devices. An industrial development seminar was held in cooperation with the Canadian Association of Manufacturers of Medical Devices, and the divi-

sion formulated an active fairs and missions program.

The branch, with the Society of the Plastics Industry of Canada, continued to examine the potential for a technology institute and an export consortium.

A revised edition was published of the Chemical Register, a comprehensive directory of Canadian chemical products and companies. The branch continued to publish annual and quarterly industrial production and trade statistics.

CHEMICAL AND RELATED INDUSTRY TRADE



Electrical & Electronics

A new Special Electronics Fund was announced to provide \$30 million in major projects funding and \$20 million in microelectronics support programs. Work was begun on an electrical industry strategy paper in response to the recommendations of the industry task force established in 1978.

Electrical

The department placed continuing emphasis on development of alternative means of generating electrical energy to replace such non-renewables as oil and gas. The efficient use of available power through such devices as heat pumps was also emphasized.

The department worked in cooperation with utilities and equipment manufacturers to develop an industrial strategy to establish and sustain a growth pattern for the industry over the next decade -- a period during which the electricity demand growth rate is expected to decrease.

Avionics

This sector continued to receive financial assistance from the Defence Industry Productivity Program for the development of high technology products and the modernization of the Canadian defence production base. However, the assistance was at a much reduced rate as the program was closed to new projects during the year.

Sales of equipment in avionics and defence electronics products were an estimated \$600 million, 80 per cent of which was exported. Of this total, 10 companies accounted for \$508 million, with the balance shared between about 30 companies.

Microelectronic Devices & Applications

Two projects were launched under the Special Electronics Fund. Mitel Corporation was allocated \$20.9 million over three years, and Linear Technology was allocated \$890,000 over two and a half years, both for development expenditures and capital equipment acquisition costs.

Consumer Products & Components

Prospects improved for most electrical and electronics consumer product sectors. The continued success of the Television Remission Program, administered by the department, increased the output of television sets to almost double the low point in 1977 when only 250,000 units were produced.

The department worked with industry to improve the export performance of the major appliance sector, which suffered from a weak domestic demand.

The department provided capital assistance to encourage plant expansion in the printed circuit board sector.

Information Processing & Technology

Imports continued to increase in this sector, despite a trend to greater product rationalization during the period under review. A particularly successful program of Canadian participation in trade missions and fairs was carried out by the department in the Far East and Western Europe.

Telecommunications

The Canadian telecommunications industry continued to receive departmental financial assistance to de-

velop and promote new products in domestic and international markets. Areas receiving assistance included television studio switchers, mobile radios, defence satellite systems and a joint U.S./Canada military electro-optic sensing system.

Assistance was provided in pursuing major projects in Saudi Arabia, Australia and Norway. The department participated in COCOM review meetings concerning electronics/telecommunications in Paris. IT&C, the Department of Communications and 20 Canadian manufacturers participated at the International Telecommunication Union trade fair and seminar in Geneva.

Transportation Industries

Aerospace Directorate

The directorate sponsored major new ventures such as the Dash-8 turbo-prop commuter aircraft, the PT-7 engine, a further phase of advanced development with the Augmentor Wing Program, and enlargement of the Computer Aided Design/Computer Aided Manufacturing capability.

Monitoring and trade development activities continued for established projects such as the Challenger, the Dash-7, engineered products and military reconnaissance drone systems.

Work proceeded under GATT to expand the freedom from duties afforded aircraft and engine parts in overseas markets under the terms of the Agreement on Trade in Civil Aircraft. Arrangements were made to inform firms about the opportunities now in place.

Management and audit intensified of established industrial benefit packages (offsets) negotiated as part

of major procurements. These included Air Canada fleet augmentation, the CP-140 Aurora LRPA, the NATO AWACS and the CF-18 NFA.

The directorate maintained responsibility for Crown-owned Canadian and de Havilland.

The aerospace sector expanded during the year, with sales at record levels and employment at a decade high. The industry is predominantly export-oriented and made major contributions to Canada's balance of trade in manufactured goods. Incoming and outgoing trade missions were supported to the E.E.C., India, Australia and Poland.

Ocean Industries

The department maintained a high level of trade promotion with export-oriented national exhibits at the Houston Offshore Technology Conference and at Europec in London, England. There was also a repeat of the previous year's exhibit at the Canada Trade Centre in Tokyo.

The discovery of commercial quantities of petroleum at the Hibernia Site off Newfoundland is expected to shift emphasis to domestic sales by the Canadian industry. Domestic content regulations at both the provincial and federal levels will help ensure that this offshore activity strengthens Canada's ocean industry.

Automotive Industry

General

The automotive industry in Canada is predominantly oriented to supplying the U.S. market. There was a marked increase in U.S. consumer preference for offshore, primarily

Japanese, vehicles, resulting in a significant reduction in automotive production in Canada compared with the previous period. Continuing buoyancy of the Canadian market combined with a shortage of offshore vehicles produced record vehicle imports from the U.S. and a trade balance deterioration of about \$2 billion.

In 1979-80 the industry was entering a period of massive technological change as it adjusted to make a new generation of fuel efficient vehicles. The transitional phase will result in the obsolescence of some plants and the creation of excess capacity in others as demand for the traditional products declines. At the same time, significant opportunities are arising for manufacture of the new components which will be required in the new generation of vehicles.

Motor Vehicles

Reduced cash flow resulting from the downturn of the U.S. market combined with the requirement to invest on an unprecedented scale to bring new fuel efficient models to the market resulted in Chrysler Corporation becoming nearly insolvent and approaching the U.S. government for assistance. During much of the period, the department worked with Chrysler Canada, other federal government departments and other governments to ascertain the nature of assistance required to protect Canadian interests. By the end of the period the negotiations were virtually complete. The department continued to work with all vehicle manufacturers to induce incremental investment and additional sourcing in Canada.

Automotive Parts

The department actively promoted involvement by the parts industry

in producing products for the new generation of vehicles. Major projects in the fields of aluminium casting and plastics were supported together with a number of smaller projects.

In order to expand parts sales to offshore vehicle manufacturers, an expanded third country duty remission scheme was introduced in which European and Japanese manufacturers were encouraged to participate. Negotiations resulted in commitments by four manufacturers to substantially increase their purchases of Canadian parts.

Sales of aftermarket parts into the U.S. continued to expand. Canadian parts manufacturers were given departmental assistance to exhibit their goods at a number of trade shows. In addition, outgoing trade missions were sponsored by the department to Venezuela, Argentina, Colombia and Japan.

As a first step in developing a strategy for the aftermarket in Canada, the department commissioned and received a study in which the market was quantified in the various product groupings.

Urban Transit

Meetings were held with U.S. officials and the Canadian industry throughout the year to discuss the implications of the "Buy America" regulation of the Surface Transportation Assistance Act. This regulation requires that imported transit equipment have at least 50 per cent U.S. content and that final assembly take place in the United States. While the Canadian industry can meet these requirements, the department is concerned that the regulation may lead to a future transfer of jobs from Canada to the U.S.

Approximately 50 per cent of the industry's annual sales of \$150 million goes to export markets. The U.S. continued to be the major buyer.

The division was heavily involved in industrial development activities. The principal project was the Intermediate Capacity Transit System developed by the Urban Transit Development Corporation of Ontario.

Increased emphasis was also placed on developing Canadian expertise in traffic control, vehicle monitoring systems and urban buses.

The division continued its analysis and response to the Sector Task Force report started in 1978.

Ships & Components

A significant increase in the value of orders from domestic customers compensated for the sharp drop in export contracts. Subsidies to shipbuilders continued at 20 per cent, and the ship repair business was maintained at a satisfactory level.

Office of Service Industries

Construction and Consulting Services, Transportation Services and Distribution Services were amalgamated in March, 1980, to form the Office of Service Industries.

Construction and Consulting Services

The Construction Services Division provided secretariat services for the Construction Industry Development Council, which comprises representatives of business, labour and government and advises the Minister on matters concerning construction.

A series of cross-country seminar was conducted to promote the wide spread use of the National Master Specification Program, a computerized system of model specification to be used as a reference document to improve the quality and efficiency of specifications production, which the division helped to develop. Contributions were made towards the following initiatives:

- the development and initial costs for regional forecasts of construction expenditures to 1990;
- the preparation of a comprehensive industrial relations manual and
- the early planning to establish a Construction Management Development Institute.

An outgoing industrial cooperation, market development mission to Egypt was organized as result of an earlier exploratory trip to that country. Three incoming missions from the Netherlands, Norway and Romania, and visits by senior officials from Egypt and Korea were also organized. The division coordinated Canadian exhibits to the 3rd Middle East Construction Exhibition and Conference in Jeddah, Saudi Arabia.

The following initiatives were in the area of renewable energy:

- a Canadian Solar Industries Association was created to be funded by the Department of Public Works (DPW) and monitored by IT&C;
- a procurement strategy was developed for the PUSH program administered by DPW;
- an exploratory market identification/industrial cooperation trip was taken to the Federal Republic of Germany and France;

a renewable energy seminar was organized in Charlottetown, P.E.I., in conjunction with the annual meeting of the Solar Energy Society of Canada.

The Consulting Services Division pursued an active program of consultations with the major sectoral representative organizations in the industry, particularly the Association of Consulting Engineers of Canada and the Royal Architectural Institute of Canada.

The division commissioned a report on the characteristics, markets, prospects and issues relating to the architectural industry.

The division participated in a departmental mission to the Federal Republic of Germany, France and Spain to discuss third country operation in capital projects. The division was also involved in the presentation of a seminar in Stockholm promoting closer links between Canadian and Swedish industries and consultants with a view to working together in third countries.

A heavy commitment was related to port development work, with consultants reporting success on 41 international contracts, some of which were assisted through the program for Export Market Development (PEMD).

The Advisory Committee on Industrial Benefits from Natural Resources Development continued to draw its secretariat from the division. The committee's work has resulted in a significant increase in the involvement of Canadian firms in supplying equipment and services to domestic resource development projects, and considerable progress in the development of Canadian capabilities to undertake the engineering, procurement and construction of large projects.

The division also provided the secretariat and funding for the Major Projects Task Force, which examined opportunities for Canadian technological and industrial input on major domestic projects.

Discussions were held throughout the year with resource development firms to ensure that domestic projects provided Canadian-based industry with opportunities to participate and contribute to the development of independent, ongoing firms in the manufacturing and service industries.

Transportation Services Branch

The threatened disruption of transport services resulting from proposed changes in international legislation and regulations continued to occupy the branch's attention. Two issues were of particular concern:

- the impact on Canadian shippers of proposed deregulation in several transport modes in the U.S.; and
- the ramifications of fuel price increases on individual industry sectors.

Maritime

The UNCTAD Secretariat continued its attempts to restructure world shipping. The branch participated in the Committee on Shipping, which discussed cargo sharing in bulk and liner trades, flags of convenience, shipper-conference relations and the proposed multimodal convention. Positions were taken for further review within the OECD, Canadian industry and other government departments.

Close liaison with industry associations such as the Canadian Manufacturers Association, the Canadian Export Association and the Canadian Shippers' Council ensured the re-

presentation of shippers' interests in these and other discussions. A program of mutual interest was developed with the Canadian Board of Marine Underwriters to promote the placement of marine insurance with Canadian companies.

On the domestic front, branch officials engaged in policy discussions regarding infrastructure requirements, Arctic Shipping, merchant marine issues and shipping legislation.

Other Branch activities included:

- the development, in consultation with the Canadian Shippers' Council, of an information base to assist shippers in negotiating with shipping conferences on escalating bunker fuel surcharges;
- production of a "Directory of Ocean Shipping Services", describing 125 services to all parts of the world;
- monitoring of freight rate increases;
- assisting individual shippers with their inquiries on the availability and cost of transportation services;
- assisting a Canadian shipping company to establish a joint service to South America.

Air

The branch participated in the following air services policy issues: the Dash-7 STOL services between Toronto, Ottawa and Montreal; amendments to Air Carrier Regulations permitting the transport of cargo in the belly of passenger aircraft on charter flights; the Canadian position for the International Civil Aviation Organization's second Air Transport Confer-

ence; amendments to passenger charter rules; Victoria-Vancouver STOL/VTOL air services; international air services competition study; negotiations of the Canada U.K. Air Services Agreement; sale of Nordair; international civil aviation policy review; and analysis of Canada-Columbia Venezuela air services.

The branch was also involved in:

- participation on a government industry committee to improve the collection of air cargo statistics
- assessment of the transportation requirements of Canadian livestock exporters;
- a study of air services between Ottawa and Boston, New York and Chicago;
- assisting Canadian companies with domestic and international air shipping problems, and working with several Canadian transportation companies wanting to export their services.

Traffic

The branch was instrumental in bringing about changes to the Transport of Dangerous Goods legislation and regulations, in particular package marking requirements. This intervention facilitated compliance by manufacturers, shippers, distributors and traffic service industries.

Branch officials led work for an industry consensus on rationalizing of pallet sizes through the Canadian Standards Association Committee on Materials Handling and Distribution. The branch was part of the Canadian delegation to a United Nations Diplomatic Conference which adopted an international convention for the settlement of damage claims in multimodal transport.

branch officials were also active in coordinating Canada's involvement in the Economic Commission for Europe's Working Party on the Facilitation of International Trade Procedures.

The branch provided transportation routing advice to individual shippers and government departments for a wide range of commodities by rail, highway and ocean. Information on transportation costs between points in Canada and the U.S. was provided to shippers assessing export markets.

A detailed survey on sources of imported fresh fruits and vegetables was undertaken for the Ontario Government's review of motor carrier legislation.

The branch played a leading role in locating a source of boxcars for a foodpulp producer having difficulty securing equipment for shipments to Mexico.

COSTPRO

Responsibility for the administration and financial support of Costpro--the Canadian Organization for the Simplification of Trade Procedures--was transferred to the department from Transport Canada.

The Costpro Secretariat is a division of the Transportation Services Branch. Costpro Inc., a non-profit corporation is a joint venture of private companies, business associations, and the federal and provincial governments. At the end of the year, it had 57 members.

The main activities of the Secretariat related to the further development of the Canadian Trade Document Alignment System and the creation of voluntary standards for the Canadian Trade Information System (CTIS) which permits adapta-

tion of computer methods and automated trade data transmission.

Costpro developed technology aimed at automated forms-filling and document transmission by electronic mail. This project (Trade Data Element Exchange-Tradex) produced a joint product development venture between the department and AES Data Limited. Field trials of the system were started.

Costpro worked with the relevant U.S. organizations and the Economic Commission for Europe (ECE) to develop data interchange standards. Continuing progress in International Trade Facilitation was achieved through liaison with the ECE and the International Chamber of Commerce.

During the year, emphasis was on communicating the message of Costpro to industry. The branch organized 30 Trade Documentation Workshops and a Vendors Conference. Speeches and presentations were made to 95 special interest groups. A newsletter was published and circulated to 4,000 recipients, and articles appeared in magazines and newspapers. The film "TRADEX--HERE AND NOW" was shown to an estimated 100,000 people in Canada and abroad.

Distribution Services

The Wholesale and Retail Division continued to research and develop data on the structure and performance of the distributive trades for use in the preparation of a sector analysis.

The division analyzed distribution in the food, general merchandise and drug trades. A computerized data base was developed to provide information for policy development and to respond to requests from industry.

Studies in franchising, cooperatives, voluntary groups and trading houses were initiated by the Merchandising Services Division in conjunction with the federal and provincial governments and industry. These studies will assist manufacturers in more effectively marketing their products both domestically and abroad, assist some Canadian retailers in expanding their business, and help pre-empt foreign chains from entering the retail market.

A series of "How to" publications and seminars were developed on franchising, and similar efforts were begun for voluntary groups, dealerships and licensing.

Export promotion included a franchising trade mission to France in which representatives of 19 franchising firms visited Paris, Bordeaux and Strasbourg in March, 1980. As a result, two Canadian franchises are expected to open in France in 1981.

In conjunction with the Department of Justice, the branch participated with the Uniform Law Commission of Canada in studying uniformity of franchise law.

Machinery /

The Machinery Program, designed to promote growth and productivity improvement in the machinery industry, continued to be a major activity for the branch. The program, while providing tariff protection to manufacturers and encouraging increased Canadian content in machinery production, allows machinery users a duty remission on imported capital equipment not available from Canadian sources.

During the year, the program received 35,000 applications covering \$4.6 billion in imports. This re-

sulted in direct savings to Canadian industry of \$350 million.

Assistance pertaining to new manufacturing capabilities, installations of integrated production lines, automotive export orders and importations of production components was provided to 309 Canadian firms. This involved additional Canadian production of \$760 million, and contributed to direct employment for 12,650.

The branch maintained detailed information on the production capabilities of more than 1,800 Canadian machinery producers to ensure that they were afforded the duty protection provided.

During the year, branch activities included:

- assessment of 21 new Enterprise Development Projects (EDP) and 2 new proposals for R&D under the Unsolicited Proposals of the DSS Procurement funds. Close to 90 active projects were monitored;

- initial review of 75 new enquiries under departmental programs and assistance to Regional Office on more than 50 EDP projects approved at the regional level;

- advisory services to the Interdepartmental Committee on DIPP involving the technical assessment of 150 projects.

During the year, the branch undertook a variety of industrial development initiatives aimed at increasing the range and volume of machinery manufactured in Canada. These included:

- production began on 33 new products to replace imports. Manufacture of these products began after branch studies showed that they represented \$60 million in new manufacturing and 1,000 new jobs.

wide range of products were covered, including machines for cleaning, mixing, packaging, ice making, insulation blowing and metal working, as well as heat exchangers and construction equipment. assessments of production opportunities were completed on such products as baking equipment, meat mixers, crew pumps, power tongs and metal bending rolls.

licensing agreements were promoted with foreign manufacturers of products such as decanter type centrifuges, fluidized zone mixing systems, modular grinders and air-cooled heat exchangers. The branch assisted in the acquisition of a new Swiss technology, the Straflo Hydraulic Turbine, which will provide a new Canadian high technology product for low head power applications.

special assistance provided to the automotive industry on Canadian sourcing capability resulted in the installation of more than \$80 million in Canadian equipment. Initiatives with foreign owned subsidiaries led to rationalization and specialization arrangements for the production of slurry pumps, air pumps and compressors, all with North American mandates. The branch initiated the development of a duty remission program to encourage the rationalization of the front-end loader manufacturing sector in Canada.

Canadian machinery continued to achieve major gains in the export market and to demonstrate significant potential for future export sales. The highlights of the branch's efforts in export development during the year included:

- approval of 105 applications under PEMD with potential business estimated at \$240 million;

- participation in 14 international trade fairs and organization of 13 trade missions. Sales from these activities amounted to approximately \$300 million.

Grain Marketing Office

Canadian wheat production dropped to 17.2 million tonnes in 1979, down almost 19 per cent from 1978. Coarse grain production, including corn, was about 17 million tonnes, nine per cent below the previous year. Oilseed production, at 5.2 million tonnes, was seven per cent above 1978.

Exports of the six major grains (wheat, oats, barley, rye, flaxseed and rapeseed) amounted to 25 million tonnes, valued at just over \$4 billion. Wheat and flour accounted for 12.2 million tonnes (\$2.3 billion), barley 3.9 million tonnes (\$509 million), and the major oilseeds 2.5 million tonnes (\$800 million).

A Grain Transportation Authority was established during the year and a Grain Transport Coordinator was appointed to ensure efficient and orderly grain movement to domestic export positions. Two thousand additional rail hoppers will be leased with deliveries beginning in April, 1980.

The Canadian Wheat Board reached major new agreements with Algeria, China and Brazil during the year under review.

In the oilseed sector, Canola processing capacity was increased with the opening of a new crushing facility at Fort Saskatchewan. Annual production of Canola oil will be 80,000 tonnes, and of Canola meal, 120,000 tonnes.

Increased grain delivery opportunities were reflected through a 39 per cent decrease, to about \$100 million, in producer advance payments under the Prairie Grain Advance Payments Act. Interest costs, borne by the government, totalled \$6.4 million, a 23 per cent increase over the previous year that reflected higher interest rates.

No payments were made under the Two Price Wheat Act, and a bill was introduced to the House of Commons twice to terminate the Act. However, elections interrupted the passage of the bill. The domestic price to millers continued to fluctuate between \$4 and \$5 per bushel.

The Protein, Oil and Starch Pilot Plant, an industry/government corporation, was actively involved in projects to improve products and processes based on agricultural commodities.

The Canadian International Grains Institute, jointly sponsored by IT&C and the Canadian Wheat Board, continued to expand its export market development activities, while maintaining a variety of programs for the Canadian industry. Fifteen courses were offered, including five newly developed specialty programs for customer countries.

The office sponsored incoming oilseed trade missions from Japan and the Republic of Korea. Outgoing technical seminars on the use of Canola oil and meal were held in Bangladesh, India, Mexico and Cuba. In addition, annual consultations were held between industry representatives from Canada and Japan.

The office, with PEMD assistance, studied the potential for Canadian

feed grains and oilseed meal in hog production projects being considered in the People's Republic of China.

Resource Industries

Manufactured Wood Products

The division continued to emphasize trade development during the year through trade missions and shows, market reconnaissance and studies. Exports from the sector have increased four-fold since 1976 to \$400 million annually.

While the U.S. continued to be the dominant market, absorbing some 60 per cent of the total Canadian exports, significant gains were recorded in sales to Western Europe and the Middle East. All major product areas contributed to this expansion.

Worldwide concern with energy conservation continued to generate a high level of interest in the Canadian timber frame construction technique. A number of delegations from Western Europe visited Canada to study the system. Visitors from France, the Federal Republic of Germany, the Netherlands and Japan travelled across Canada to assess the various aspects of our house-building system.

Consultation continued on industrial cooperation with Japan and the European Communities Commission. The division was involved in a number of industry and inter-government committees and associations, covering a wide range of products. The Canada/Japan Housing Committee, with senior representatives of industry and government in both delegations, met for the fourth time in June, 1979.

Pulp and Paper

Several policy/program initiatives were contained in the National Development Policy for the Forest Industries announced the previous year. These included a \$276 million program to modernize the pulp and paper industry. The program is to be implemented through federal/provincial cost-sharing agreements over five to seven years.

Reviews of more than 50 applications produced recommendations on the technical feasibility, impact on productivity and costs, marketing and trade implications of the program. The program, virtually complete in Ontario, is well under way in Quebec and has commenced in the Atlantic provinces.

Continued efforts were directed toward the promotion of industrial cooperation through work with international committees. These included the Canada/EEC Ad Hoc Forest Products Working Group, the Canada/Japan Joint Economic Committee, the Canada/China Joint Trade Committee, The Canada/USSR Working Group on the Forest Products Industries, Harmonized System Committee of the Customs Cooperation Council, the Canada/Cuba Joint Committee, and the OECD Working Party on Pulp and Paper.

Iron & Steel

A Canadian trade mission was organized to Venezuela, Trinidad and Tobago, Puerto Rico and Mexico in March to investigate the potential medium and long-term markets for Canadian structural steel and to explore the opportunities for Canadian steel service centres. As a result, major sales were concluded and a joint venture initiated to develop a construction-steel service centre in Mexico City.

Departmental officials participated in the ongoing activities of the special steel committee within the OECD. The committee was initiated in 1978 to provide a forum for discussions by the major western industrialized countries on impediments to international trade in steel.

Throughout the year there were talks with the U.S. concerning restrictions on specialty steels and with U.S. and E.E.C. officials on actions to control steel imports through minimum price schemes.

Non-Ferrous Metals

As a consequence of the December, 1978, mission of gold mining experts to Canada, and at the request of the Chinese government, the department organized a six-week training program for Chinese engineers at Canadian gold and non-ferrous metal mines.

This mission and training program led to a contract for a Canadian engineering firm to complete a feasibility study for the Chinese government on a gold prospect in Shandong province. Should development of the mine be feasible, the company may obtain the contract to plan the design and operating procedures of the mine and associated facilities.

A Canadian delegation led by this division attended meetings of the International Lead and Zinc Study Group to discuss the worldwide market situation for these metals.

Industrial Minerals

The division arranged incoming coal buying missions from Yugoslavia, France, Brazil, Sweden and Japan. Outgoing missions were arranged to Yugoslavia and Italy to obtain coal market information, subsequently passed on to Canadian companies.

The division assessed a number of proposals for expansion of the Cape Breton coal industry, including a proposal for export of coke from that island.

The international market potential for the proposed coal mines in northeast British Columbia was evaluated.

Consultations on asbestos health issues were arranged between Canadian and American officials. A number of departments were involved in this effort to develop an effective, non-sensational approach to the protection of health, while safeguarding Canadian export interests. Similar work continued with the European Economic Community.

The division:

- worked with other departments and the carbon and steel industries to alleviate a serious shortage of graphite electrodes used in electric furnace melting of steel;
- provided market surveys for the development of industries in abrasive grinding wheels, calcium carbonate, barite and circuit boards;
- initiated discussions with companies and other departments on Canada's increasing trade imbalance in abrasive grinding wheels;
- evaluated proposals under EDP, PEMD and IERD programs;
- held consultations with DREE on major projects, including the proposed salt mine on the Magdalen Islands.

Metal Fabricating Industries

This new division was formed during the year to improve the departmental service to the industries in the metal manufacturing sector. It

commenced operations at the beginning of January, 1980.

Primary Wood Products

The Cooperative Overseas Market Development Program continued to be a major element in the division's export market development activities. The program, funded jointly by IT&C, the B.C. Government and the Council of Forest Industries of British Columbia, promotes Canadian wood products in promising offshore markets. Overseas exports in this sector have risen from \$24 million in 1970 to \$1.4 billion in 1980.

The division also:

- conducted a survey on the potential for the waferboard industry in the European market and presented the findings to the Canadian Waferboard Association;
- identified Egypt as a promising market for Canadian lumber;
- participated in an exhibit at the "Euroforesta" forestry trade show in Verona, Italy;
- participated in seminars on Canadian wood products in Minneapolis, Boston, Detroit, Chicago and Los Angeles;
- participated in discussions and meetings of joint committees with Japan and Norway;
- evaluated applications under the Enterprise Development Program and other IT&C programs;
- consulted with the Department of Regional Economic Expansion and other federal departments concerning their projects and programs which impact on the primary wood products industries.

A number of incoming trade missions were led by division personnel. These included:

- a technical mission from France which visited a number of mills and building sites;

- a mission of British lumber importers which examined Canadian manufacturing and transportation systems;

- a Chinese mission which reviewed the research and production facilities of the wood treating industry;

- a Chinese mission which toured the B.C. forest industry and assessed its capability as a supplier to world markets.

During the Multilateral Trade Negotiations, it was decided that satisfactory progress towards development and adoption of a common set of softwood plywood standards in Canada and the U.S. by January 1, 1983, would be a prerequisite to reductions in tariffs in both countries. The division led consultations with Canadian industry, provinces and federal departments regarding this issue.

Efforts were undertaken to better inform Canadian industry of the programs provided by the department. This included presentations to several association meetings, and to a seminar at the Forest Industry Equipment Exhibition in Ottawa.

Agriculture, Fisheries and Food Products

Total exports of agricultural products and fish products reached a record \$7.7 billion in 1979. Exports of the commodities for which the branch is responsible were worth \$4 billion in that year,

and first quarter results indicated that the export performance of these sectors would be even more impressive in 1980.

Agriculture

A series of market development missions, seminars and trade fair presentations highlighted a year of promotions in the Agricultural Products and the Livestock, Dairy and Meat Products Division. A major thrust of both divisions was the promotion of the high quality genetic material available from Canada's breeders of plants and livestock.

A technical mission of seed experts from the United Kingdom and the Netherlands reviewed recent developments in Canadian forage crop research, regulatory and legislative issues, seed production and marketing.

Canadian firms interested in the Japanese market were brought together with representatives of a seed mission from that country. Canadian ability to multiply Japanese forage varieties for re-export to Japan was demonstrated and the export potential for selected Canadian varieties was explored.

The department sponsored an incoming delegation of senior plant health officials from Egypt to familiarize them with Canadian disease control procedures and seed production. The visit was arranged after encouraging results were achieved from several years of testing with Canadian potato varieties in Egypt.

New export sales resulted from a processed pork mission to Japan. A working paper on processed meat production and export was distributed to the industry.

Government and industry participated in a cheese promotion in New York, attended by the major U.S. cheese importers.

A departmental official took part in a technical mission which investigated the impact of dairy/vegetable product blends on the European market and the potential of such products in Canada.

Departmental exhibits promoted Canadian dairy cattle, beef cattle, swine, semen and embryos at the Royal Highland Show in Scotland, the Salon de l'Agriculture in France and the Royal Easter Show in Australia.

The division also:

- sponsored incoming missions from Brazil, Japan, Colombia and Czechoslovakia to promote the sale of Canadian breeding stock;
- sponsored seminars in Korea and the People's Republic of China to promote Canadian dairy and beef cattle;
- sent livestock judges/classifiers to Australia, Spain, Argentina, Colombia, Mexico, Brazil and the United Kingdom;
- conducted a survey of selected countries for swine breeding stock.

Fisheries

Fishery exports reached a record \$1.3 billion. Fisheries sales missions and promotions were organized in Japan, Hong Kong, Singapore, the United States and Europe. Incoming buyer missions were sponsored from Japan and four European countries.

The division continued to provide financial support to the North Atlantic Seafood Association's

promotion of ground fish in North America.

With Fisheries and Oceans, the department participated in a worldwide study of fishery markets provide a basis for developing market strategies in light of changes resulting from the general adoption of 200-mile zones.

Food

The division organized 23 Canadian companies into a national exhibit at the ANGUA International Food Fair in Cologne, Germany. On-site Canadian sales were \$1,130,000.

Canadian food and beverage shows were held in Atlanta and Minneapolis. In addition, "Canada Week" promotions were held in retail stores in Cleveland and Minneapolis.

The division brought buyers missions from Japan to visit key Canadian processing and marketing centres. Promotions featuring Canadian food products were held in Japan, with the assistance of large retail organizations.

A new section of the Program for Export Market Development (PEMD) dealing with the needs of the agriculture, fisheries and food products sector was introduced. PEMD(R) replaced the Agricultural and Food Products Market Development Assistance Program and the Grains and Oilseeds Marketing Incentives Program.

The department published a monthly newsletter, Trade News: Food and Agriculture, which reviewed market developments in agriculture and food commodities in Canada and abroad. It highlighted actual and potential market opportunities on a short, medium and long-term basis.

Technology

seventeen awards were made to 11 universities under the Technological Innovation Studies Program during the year. Four of them were for the development of technological innovation and entrepreneurship courses which will be made available to science, engineering and business students and the business community.

More than 3,000 copies of reports from this program were distributed during the year. They covered such subjects as how to establish a technology based business and optimum strategies for small to medium sized companies in Quebec.

Contracts were signed with the University of Waterloo and with École Polytechnique de Montréal providing a maximum of \$200,000 to each university to develop five-year business plans and to start-up Industrial Innovation Centres. The centres will evaluate inventions and assist in the development and commercialization of new products and in the establishment of new technology-based companies.

During the year, grants were awarded to eight Industrial Research Institutes (IRI) and Centres for Advanced Technology (CAT) under a program to encourage universities and provincial research organizations to undertake research and development projects and provide technological advice to industry. Six IRI's and three CAT's previously given support are now self-sustaining through income generated from contracts with industrial firms.

Support continued for the Welding Institute of Canada, the Canadian Research Institute and the Sulphur Development Institute of Canada. In addition, a Centre for Re-

search and Development in Masonry was established in Calgary.

Assistance continued for four centres of international business studies at Canadian universities and management advisory institutes at the University of Alberta and at Laval. Negotiations began with the three Prairie provinces to establish a centre for international business studies in that region.

The Computer Aided Design and Computer Aided Manufacturing Technology Advancement Council, established by the department in 1978, was active during the year, promoting the increased use of CAD/CAM. It began preparation of a major report, "Strategy for Survival", which will be completed and distributed in 1980.

A marketing study for the Canadian space industry's products and services was initiated for completion in 1980. The study will enable the department to develop a strategy of support to Canada's space industry. The department continued to support development of space-related products under the Defence Industry Productivity Program and helped promote Canadian products and services for the proposed Australian satellite system.

Proposals for implementing the GATT Agreement on Technical Barriers to Trade in Canada were completed in consultation with other federal departments and agencies. This agreement was signed in December, 1979, and work was started to establish an Enquiry Point relating to its provisions and to prepare a directive to guide federal departments and agencies in complying with its provisions.

Work also continued toward coordinating and planning the metric conversion process within the federal government.

Design Canada

The National Design Council, which promotes design in product development by the private sector, organized three statutory council meetings and several advisory committee meetings during the year. The Corporate Procurement and Planning Committee and the Task Force on the Commercialization of Energy Conserving Products were created.

A series of design awards were unified into the Design Canada Awards Presentation in Toronto. The presentation, encompassing product awards, professional citations and the National Design Council Chairman's Award for Design Management, received extensive media coverage and more effective promotion of design throughout Canada.

Other promotional Programs included seminars, exhibits, publications and design conferences.

Design Canada provided a full range of advisory services including design evaluation assistance to Industry Sector Branches and Regional Offices for the Enterprise Development Program, design process assistance to secondary industry and administration of the federal/provincial Product Development Management Program.

Fourteen scholarships were awarded for design education. Eight were for studies in industrial design, five for graphics and one for textile design.

Members of the National Design Council and Design Canada attended the 41st General Assembly of the International Council of Societies of Industrial Design in Paris, France. Information was exchanged on the latest developments in product design, government assistance and design application.

The Industrial Design Engineering Education Task Force completed a survey of educational facilities and curricula and prepared a draft report with its recommendations. The report will be finalized 1980-81.

ANADIAN GOVERNMENT OFFICE OF TOURISM

Canada's tourism deficit dropped from \$1.7 billion in 1978 to \$1.1 billion in 1979. Contributing factors were:

visits by more than 30 million Americans who contributed \$1.9 billion to Canada's tourism receipts;

visits by a record two million overseas visitors who contributed 1 billion to Canada's tourism receipts;

realignment of the Canadian dollar;

a decreasing tendency by Canadians to travel abroad; and

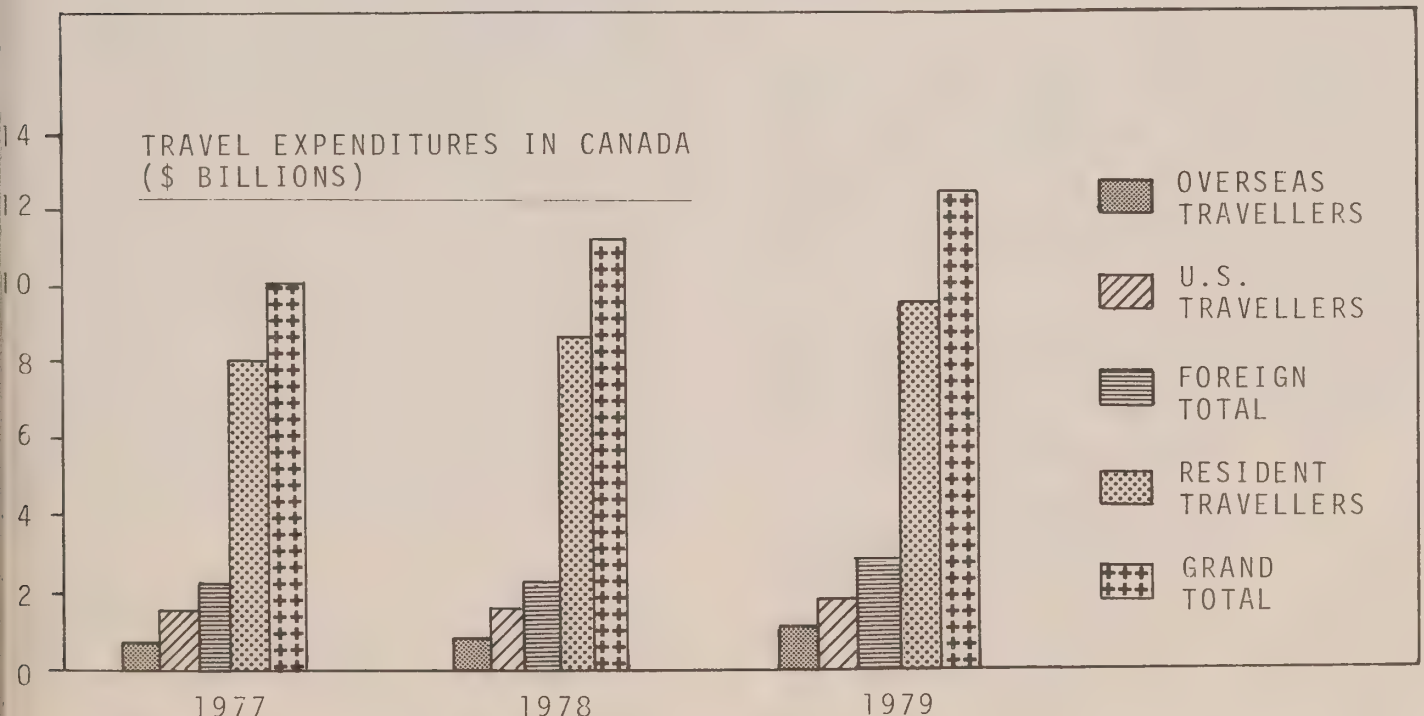
increased attention by governments and industry to the problems of the tourism industry.

Tourism Marketing

CGOT operated 27 market development and promotional offices in Canada, the United States, Britain, France, the Federal Republic of Germany, Mexico, Australia, Japan and the Netherlands.

Major advertising campaigns in the United States promoted spring/summer and fall/winter vacations. Seminars were sponsored for the travel trade, direct-response advertisements were placed and mailings were made to special interest groups.

The "Canada: So Much To Go For" program, begun in 1978 to encourage Canadians to travel within Canada, offered 83 competitively-priced packages tours in a cooperative venture that involved CGOT and industry "partners". The number of tours offered in 1980 increased to 93.



Partners in the program are Air Canada, CP Air, VIA Rail Canada, Pacific Western Airlines, Nordair, Quebecair/Hospitalité Tours, Voyageur and Trailways bus lines.

Vacation Canada advertisements reached almost 70 per cent of all Canadians. A campaign was carried out in ethnic publications, inviting new Canadians to see Canada, and encouraging their friends and relatives abroad to visit here.

The third Rendez-vous Canada, held in Montreal September 16 - 20, 1979, included 132 selling organizations and 154 buying organizations. The projection of business as indicated by buyers and sellers for 1979 was an estimated \$37 million.

Under the Awareness and Attitude program, a new method was developed to supply up-to-date information to vacationers entering Canada by automobile from the United States. Information can be customized to the port of entry and province to be visited.

Contents to these "Welcome to Canada" packages are provided by CGOT, other federal departments and provincial tourism departments. Revenue Canada (Customs and Excise) distributes the packages at 120 land border-crossing points.

CGOT coordinated major marketplaces and sales blitzes in Washington and Chicago, seminars in Boston and Detroit, and Canadian participation in major industry trade shows.

The office also coordinated efforts with the Tourism Industry Association of Canada to sensitize Canadian operators to new West German consumer protection legislation which makes tour operators responsible for delivery of all tour components advertised.

CGOT also:

- sent out 8.8 million pieces of promotional literature;
- sponsored 400 media representatives on Canadian tours;
- prepared 100 travel features for Canada and U.S. publications;
- prepared 18 publications in up to 10 languages for consumers and the trade.

Tourism Development

CGOT provided active support for the National Manpower Strategy Study being done by the industry under the direction of the Canadian Hospitality Institute.

Two new directories were published: "Resources for Tourism/Hospitality/Recreation" and a "Careers Guide to the Tourism/Hospitality/Recreation Industry".

CGOT provided financial support for the formation of new training programs, particularly the development of professional standards in culinary training by the Canadian Federation of Chefs de Cuisine.

Approximately \$2.2 million received from the federal government's summer and year-round job corps programs was used to provide employment for 556 persons in 54 tourism-related projects. One such undertaking was an extensive inventory research project to identify facilities, goods and services that could be used in stimulating travel by vacationers between the ages of 19 and 26.

New regional development offices were opened in Halifax and Victoria to coordinate tourism planning and product development.

Tourism Development sub-agreements were signed with Manitoba and the Yukon similar to agreements signed earlier with British Columbia, Newfoundland, Nova Scotia, New Brunswick and Quebec.

Policy, Planning and Coordination

Major projects included wrapping-up outstanding recommendations of the Tourism Industry Consultative Task Force. In addition, Regional Policy Representation, the means by which CGOT interests are represented in the Atlantic provinces, began operations in 1980.

Research and Analysis undertook: four quarterly Canadian Travel Surveys covering the whole of 1979; market intelligence presentations to the trade and partners in 18 Canadian centres; a study determining the attitude of the French to Canada as a holiday destination; market probes in the United Kingdom, France, West Germany and the Netherlands; a Canadian Attitude Tracking Study for the second year in a row; a continuation of the Canadian Vacation Pattern Study now in its 13th year; the production and distribution of a Tourism Facts Binder with quarterly updating; and continued work on expanding CGOT's Package Tour Inventory.

PERSONNEL

Identification of training and development needs was integrated into the personnel management planning process. More effective quality control was achieved in the appraisal process by increasing management's level of accountability.

The staffing process was changed to improve effectiveness and quality of service, and a change in the pay system was implemented.

The Classification Division coordinated three conversion programs: two involved more than 200 positions in the Senior Management category, and the third involved 60 positions in the Economics, Statistics and Sociology group.

The Senior Management Committee approved recommendations for the advancement of the Official Languages Program, further emphasizing such areas as francophone participation, the development of bilingual units, the provision of bilingual telephone answering service and the upgrading of linguistic proficiency levels.

The Interchange Canada Program was revitalized to focus primarily on exchanges with the private sector.

POLICY PLANNING

Economic Policy and Analysis

The four branches of Economic Policy and Analysis provided economic intelligence, research, analysis, policy planning and coordination to all sectors of the department.

The Trade and Structural Analysis Branch continued to provide detailed international trade data from its U.N. Trade Data Bank and the IT&C Canadian Explor Model (CEM). The branch continued to carry out representational work at the OECD, analytical projects in international economics and industrial development and adjustment in relation to the Canadian economy.

The Microeconomic Analysis Branch completed studies and briefings in high technology, declining sectors, foreign ownership and multinational enterprises. In addition, the branch completed its semi-annual survey of business investment and the annual survey of foreign owned subsidiaries and the reports resulting from these surveys.

The Economic Intelligence Branch provided Ministers and senior management with information on current and short term economic conditions in Canada and abroad. The branch also published periodic studies on Canada's trade performance and competitive position.

Special Projects Branch is being formed as a centre of departmental expertise on cost-benefits methodology and project analysis.

METRIC COMMISSION

Fifty-seven per cent of Canada's metric conversion program was completed at the end of the fiscal year. The planning and scheduling of more than 89 sectors is complete and implementation is well advanced. A total of 36 sectors have completed 75 per cent or more of their planned activities.

Metric Commission Canada has held 62 meetings since the program began in 1972. The Interdepartmental Committee for Metric Conversion, which coordinates federal government conversion activities, has met 20 times.

The provinces and territories are carrying out their own conversion programs through legislation and regulatory action. Information centres are operating in nine of the 12 provincial and territorial capitals on a cost-sharing basis. The Intergovernmental Metric Conversion Committee has met 24 times.

INDUSTRY, TRADE AND COMMERCE
Statement of Expenditures for the Fiscal Year 1979-80

		\$ (000)
<u>Trade Industrial Program</u>		
Operating Expenditures		
- Salary and superannuation	75 387	
- Other	<u>46 225</u>	121 612
Grants and Contributions		
- Enterprise Development Program	77 251	
- Defence Industry Productivity Program	57,936	
- Program for Export Market Development	12 785	
- Capital subsidies for the construction of commercial and fishing vessels	83 335	
- Metric Conversion	2 114	
- Canada Works Program	5 305	
- Small Business Loans - Losses	1 916	
- Payment of EDP Insurance Losses	5 208	
- Payment of EDC Insurance Losses	6 539	
- Payments for construction of dry docks	3 366	
- Miscellaneous	<u>3 888</u>	259 643
Loans and Investments		
- Loans to deHavilland Aircraft	633	
- Loans under the Enterprise Development Program		
- Loans to assist Defence Manufacturers with defence plant modernization	13 932	
- Loans under the footwear and tanning industries adjustment program		
- Loans to Canadair for the financing of water bombers	<u>18</u>	14 583
		<u>395 838</u>
<u>Tourism Program</u>		
Operating Expenditures		
- Salary and superannuation	7 874	
- Other	<u>19 467</u>	27 341
Grants and Contributions		
- Miscellaneous		<u>2 181</u>
		<u>29 522</u>

INDUSTRY, TRADE AND COMMERCE
Statement of Expenditures for the Fiscal Year 1979-80 (con't.)

Grains Program

		\$ (000)
Operating Expenditures		
- Salary and superannuation	1 079	
- Other	<u>574</u>	<u>1 65</u>
Grants and Contributions		
- Credit Wheat Sales	16 448	
- Payment to the Canadian Wheat Board to cover carrying charges on reserve stocks of feed grain	2 200	
- Prairie Grain Advance Payment Act	6 394	
- Western Grain Stabilization Program	95 559	
- Payments to CNR and CPR for rehabilitating box cars	8 044	
- Assistance to the Canadian rapeseed processing industry	3 000	
- Miscellaneous	<u>4 020</u>	<u>135 66</u>
		<u>137 31</u>
Total Department		<u><u>562 6</u></u>

INDUSTRY, TRADE AND COMMERCE

Statement of Revenues
For the Year Ended March 31, 1980

Return on Investments	\$ (000)
Interest on loans to Export Development Corporation	93 596
Interest on loans to Federal Business Development Bank	91 270
Interest on loans to assist manufacturers of automotive products	339
Interest on loans to assist the pharmaceutical industry	25
Interest on loans to assist the footwear & tanning industries	105
Interest on loans under the Enterprise Development Program	818
Sundry	678
Miscellaneous Revenue	7 340
Refunds of Previous Year's Expenditures	<u>6 906</u>
	<u><u>201 077</u></u>

Canada 

(aussi édité en français)



Government
of Canada

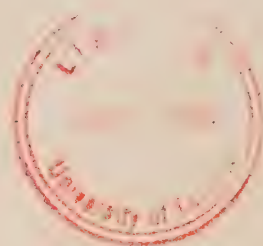
Gouvernement
du Canada

Industry, Trade
and Commerce

Industrie
et Commerce

ANNUAL REPORT

1980 ~ 1981



OTTAWA

The Honourable Herb Gray
Minister of Industry, Trade and Commerce
Ottawa, Ontario

Dear Sir:

I have the honour to submit the annual report of the Department of Industry, Trade and Commerce covering the activities during the period April 1, 1980 to March 31, 1981.

Respectfully submitted



Robert Johnstone
Deputy Minister

OTTAWA

To His Excellency
The Right Honourable Edward Schreyer, C.C.
Governor General of Canada

May it please your Excellency:

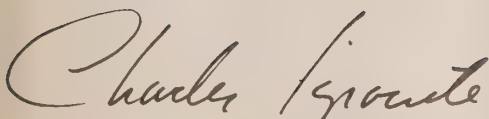
I have the honour to submit to your Excellency the annual report for the Department of Industry, Trade and Commerce covering the period April 1, 1980 to March 31, 1981.

A summary of the Department's policies, activities and services is laid before Your Excellency.

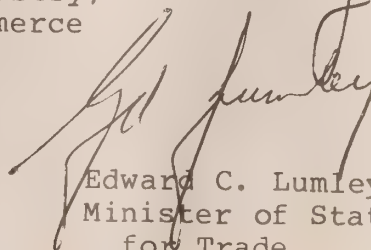
Respectfully submitted



Herb Gray
Minister of Industry,
Trade and Commerce



Charles Lapointe
Minister of State
for Small Business and Tourism



Edward C. Lumley
Minister of State
for Trade

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HIGHLIGHTS

The Department of Industry, Trade and Commerce, 1980-81 in brief:

* More than 300 Canadian business people took part in 44 IT&C sponsored trade missions to 42 countries; 931 companies participated in 66 trade exhibits; and information booths were set up at 32 trade fairs.

* A Canadian Export Strategy for the 1980s was developed.

* International tourism receipts of \$3.3 billion made the industry one of Canada's top six earners of foreign exchange. Yet, Canada's travel deficit increased to \$1.138 billion from \$1.068 billion in 1979.

* 121,347 enquiries were processed and 6,336 visitors received by the department's 10 Business Information Centres.

* 49 projects, generating sales of \$840 million, were completed under the Defence Industry Productivity Program (DIPP) in 1980-81. In addition, 92 new projects were contracted and total program expenditures were \$94.9 million.

* 151 firms received adjustment assistance loan guarantees valued at \$231 million through the Enterprise Development Program. EDP provided 142 manufacturing firms with \$111.5 million in loan insurance, and authorized \$98.2 million towards the cost of 549 innovation and product development projects.

* 17,825 loans, valued at \$460,485,029, were made to small businesses under the Small Business Loans Act.

* Canadian exports to Eastern Europe continued to reach record levels, increasing by 56.7 per cent to \$2.1 billion in 1980.

* The department's three ministers promoted Canadian goods and services and advanced international trade during visits to the United States, China, India, Hong Kong, Japan, Australia, New Zealand, Mexico, Paraguay, Argentina, Peru, Chile, Ecuador and the five ASEAN countries.

* Canada achieved a record \$7.8 billion surplus in merchandise trade in 1980. Canadian exports were \$76.2 billion and imports were \$68.4 billion.

FINANCE

Programs

Enterprise Development Program

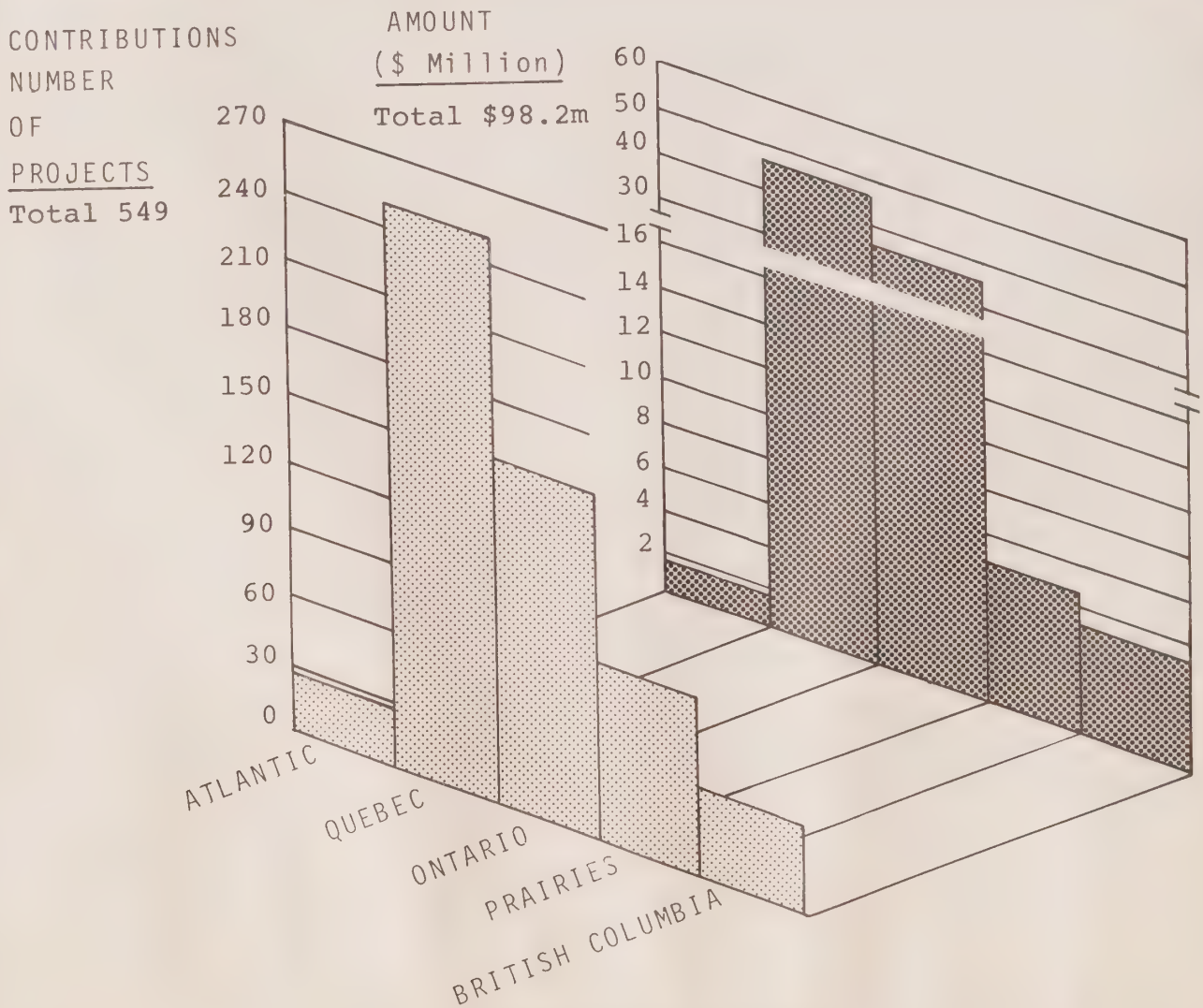
The Enterprise Development Program (EDP) provides assistance to manufacturing and processing firms to improve their viability and international competitiveness.

During 1980-81, 151 adjustment assistance loan guarantees valued at \$231 million were authorized. In addition, \$98.2 million in contributions were authorized towards the cost of 549 innovation and product development projects in such indus-

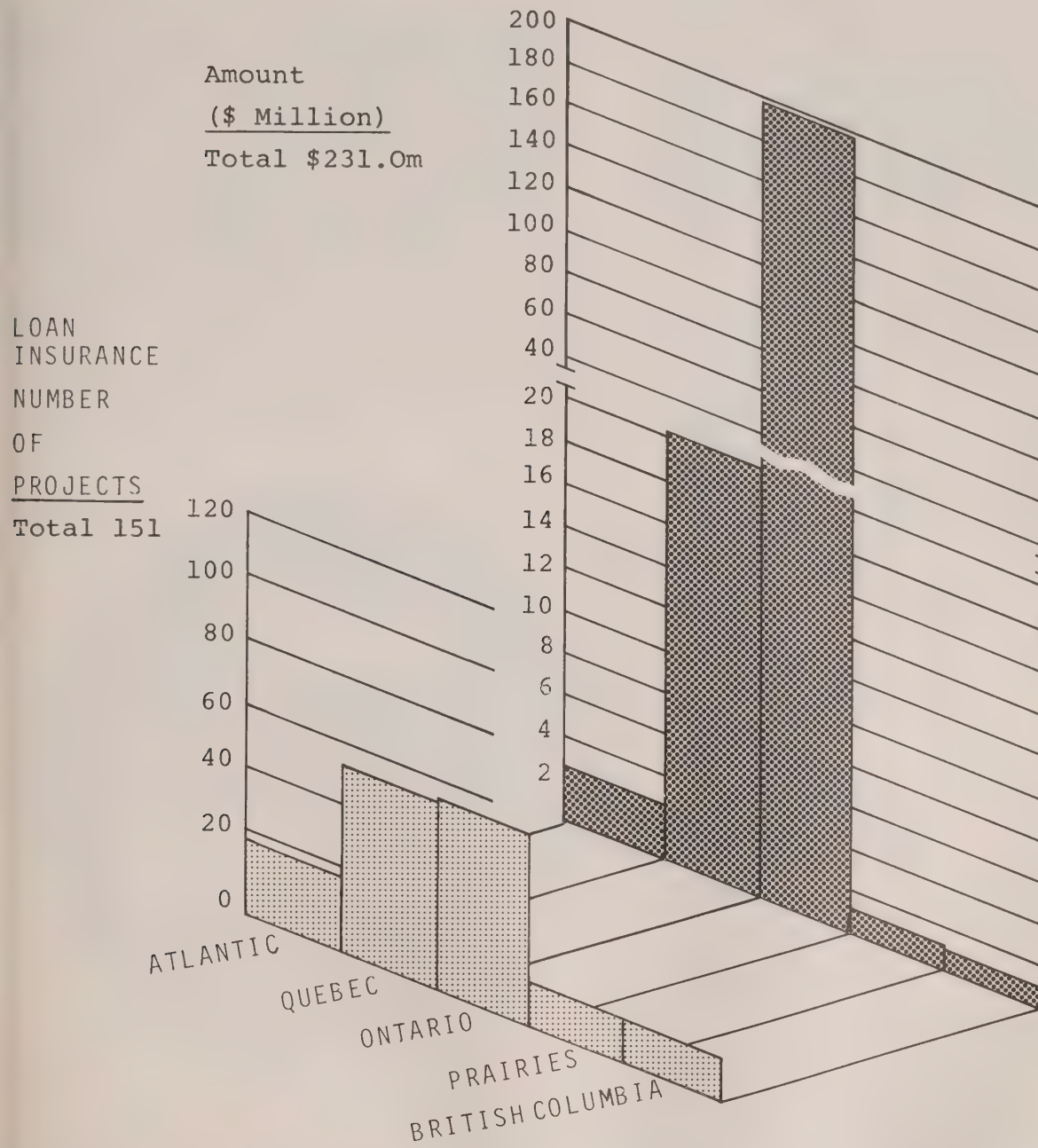
tries as machinery electronics chemicals, ship components, automotive vehicles, building components and textiles.

Under the program, insurance of \$111.5 million was authorized for 142 loans made by private lender to manufacturing firms. Because of the EDP loan insurance, it is estimated that approximately 4,700 jobs will be created or maintained during the next five years. Similarly, forecasts for the 549 projects receiving innovation assistance during the year are for sales of \$3 billion during the next five years and 8,700 jobs being created or maintained.

Expenditures Under the Enterprise Development Program, by Region 1980-81



Adjustment Assistance Loan Guarantees, by Region, 1980-81



Export Market Development Program

During the year, 3,412 applications were received for the Program for Export Market Development (PEMD). Approximately \$15 million was approved and \$9.04 million was paid out. This compares to the previous year when 3,397 applications were received, \$20.1 million was approved and \$9 million was paid out.

Companies reported export sales of \$400 million as a result of the program, bringing to \$4.6 billion the amount of exports generated

with PEMD assistance since the program was started in 1971.

PEMD helps develop and increase the export of Canadian goods and services by sharing with the business community the financial risks of entering new foreign markets. The program's eight sections cover specific project bidding, market identification, participation in trade fairs, incoming buyers, formation of export consortium, sustained export market development, export markets for agriculture, fisheries and food products and contribution to non-profit organizations.

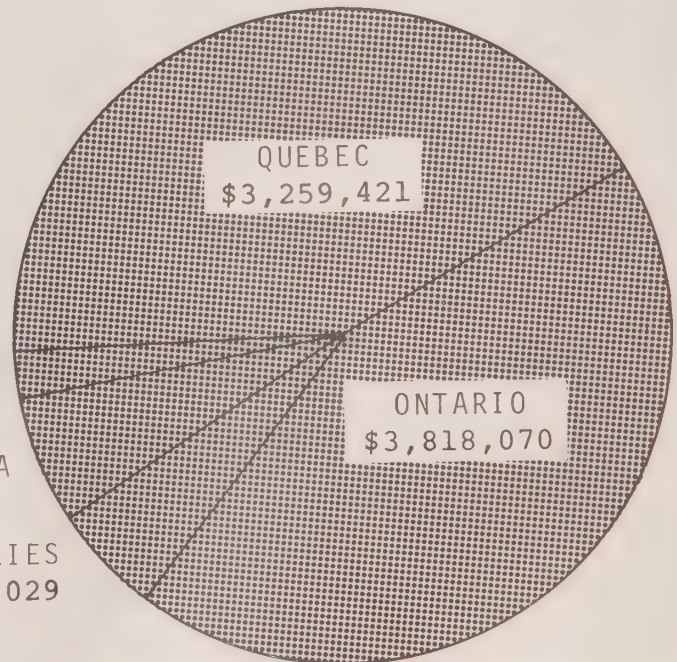
EXPENDITURES UNDER THE PROGRAM FOR EXPORT MARKET DEVELOPMENT FISCAL YEAR 1980-81

TOTAL \$9,044,032

ATLANTIC
\$428,201

BRITISH COLUMBIA
\$790,311

PRAIRIES
\$748,029

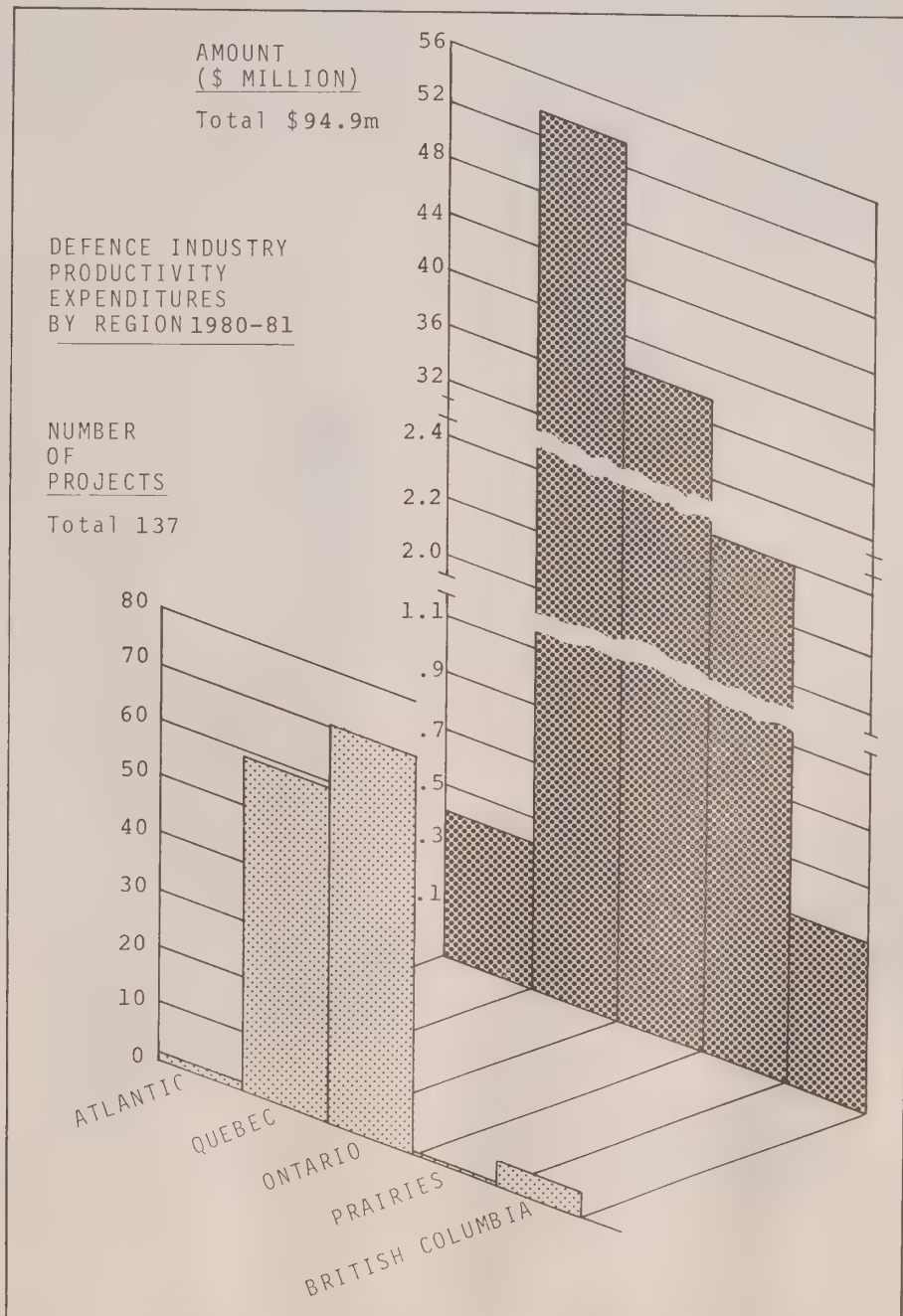


Defence Industry Productivity Program

A total of 49 projects, generating sales of \$840 million, were completed under the Defence Industry Productivity Program (DIPP) in 1980-81. In addition, 92 new projects were contracted and total program expenditures were \$94.9 million. Sixty-five per cent of the sales generated under the

program were in the defence export market, while 35 per cent were in related civilian exports.

DIPP helps develop and sustain the technological capability of the Canadian defence and related civilian industries. The program operates under international agreements for defence development and product sharing.



Industry Energy Research and Development Program

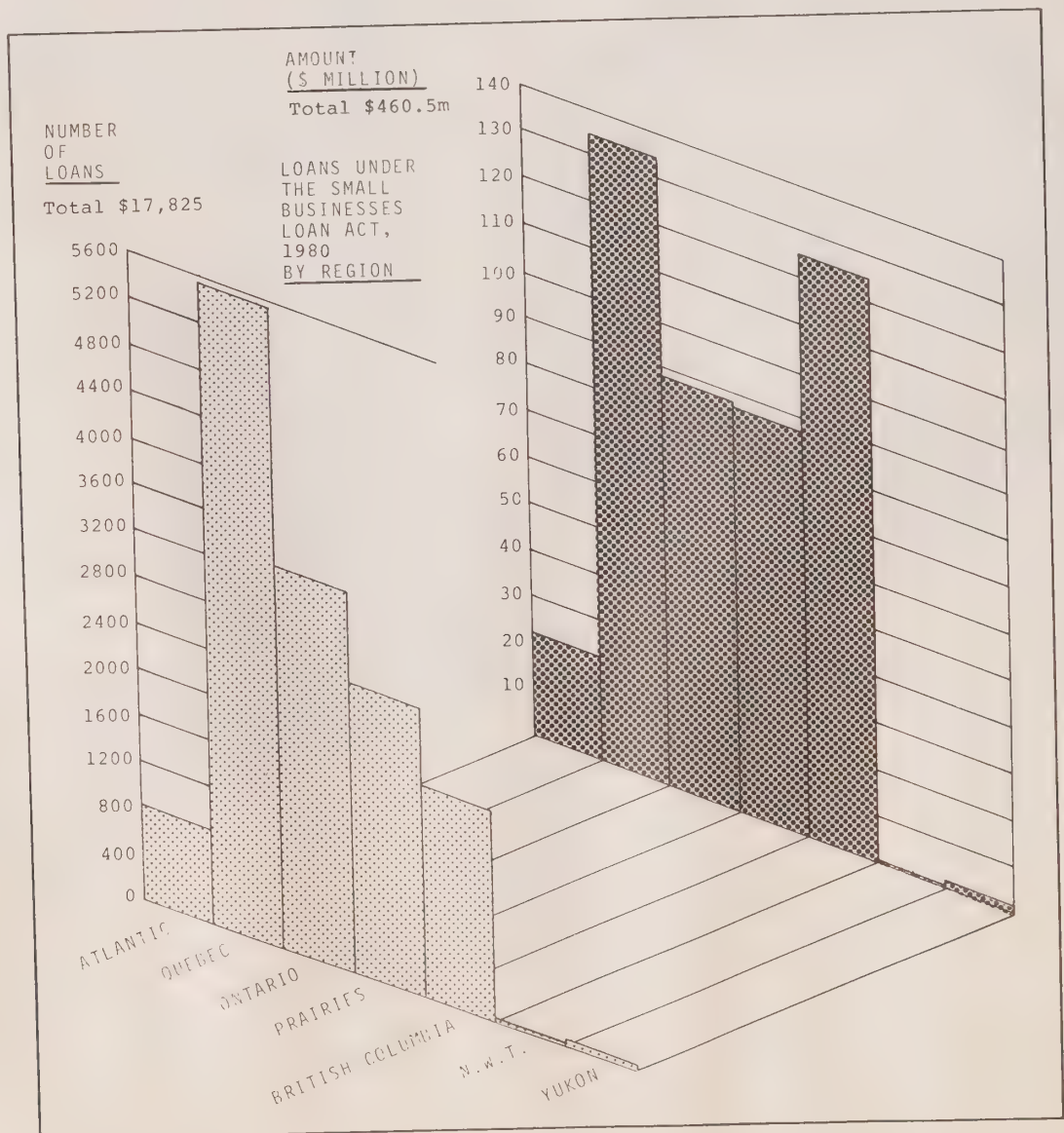
The Industry Energy Research and Development Program (IERD) assists Canadian industry with research and development of new and improved processes and equipment to reduce industrial energy consumption. The program also helps promote and market this technology.

Since its inception, 15 projects requiring total funding of \$3,074,500 have been approved. Of this amount, \$1,211,143 comprises actual expenditures to date and \$1,862,900 comprises commitments made to fiscal year 1983-84. In 1980-81, expenditures under the program were \$579,301.

Small Businesses Loans Act

During the year, 17,847 loans for \$461,488,477 were made under the Small Businesses Loans Act (SBLA) compared to 11,825 loans for \$284,852,265 during 1979-80.

The program encourages lenders in the private sector to make term loans available to small Canadian businesses for a wide variety of capital improvements. The loans guaranteed by the federal government, bear maximum interest rate of bank prime plus one per cent. The maximum term is 10 years.



Productivity Improvement/Interfirm Comparisons

The Productivity Improvement Service, formed to assist Canadian industry in improving its competitiveness, undertook a variety of industry sector interfirm comparisons during the year, including portable appliances, aluminium windows and doors, wooden furniture, paint, coated fabrics, carpets and posiers, steel fabricators and mechanical contractors.

Some 200 firms participated in the course of the year, bringing the number of different firms that have benefited from the program to 200.

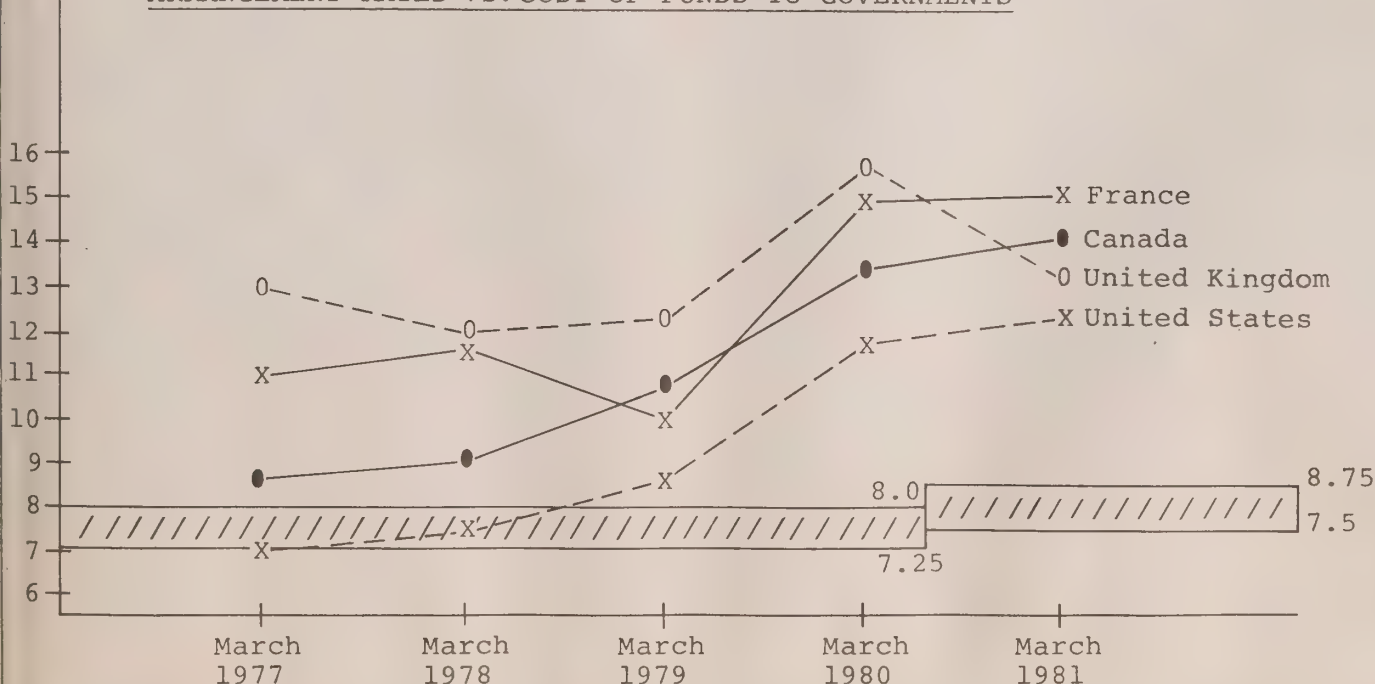
Financial Policy and Liaison

The branch studied financial institutions, markets and instruments involved in achieving departmental objectives. It advised the department on Crown corporations and other financial institutions, as well as on trends and activities in the financial sector.

During the year, considerable attention was directed to the financing of small and medium-sized businesses. Financial Policy and Liaison was the focal point for studies on the competitiveness of Canadian export financing, and represented the department in a series of international meetings on this subject.

Much activity focussed on negotiating changes within the OECD Arrangement on Officially Supported Export Credits. Also known as the Consensus, this involves established minimum interest rates that no longer reflect market conditions and have resulted in increasing levels of subsidization in export financing. International negotiations continued on reducing the level of official subsidy. The table illustrates the difference between the Arrangement rates and the cost of funds to various governments, as determined by yields of long-term government bonds.

ARRANGEMENT RATES vs. COST OF FUNDS TO GOVERNMENTS



Small Business

The Office for the Reduction of Paperburden closed down as scheduled in the "sunset legislation". It submitted further recommendations to Cabinet and turned some functions over to the Advocacy Office of the Small Business Secretariat.

The Advocacy Office, which maintains contact with the small business community, identified and monitored the major issues affecting small businesses and recommended policy changes.

The secretariat held meetings with associations such as the Canadian Federation of Independent Business, the Canadian Manufacturers Association, l'Association des Commissaires industriels du Québec, the Canadian Organization of Small Business, Chambers of Commerce, the Retail Council and others. Visitors were received from provincial governments and various countries such as Australia, Finland, the U.K. and Zimbabwe.

The Advocacy Office developed procedures for dealing satisfactorily with "last resort appeals" and information requests.

During the year, the Small Business Secretariat was involved in the development of national policies and programs which affect small businesses. For example, it helped bring about new tax measures and revisions which increased the maximum amount of loan guarantees under the Small Business Loans Act to \$100,000. The Small Business Development Bond was enacted February 26, 1981, retroactive to December 11, 1979. A further tax measure geared to help small businesses

makes salaries paid to a spouse in an unincorporated business tax-deductible.

Although the October, 1980, federal budget called for a nine per cent sales tax on advertising flyers and catalogues distributed as newspaper inserts, small community newspaper and independent printers lobbied successfully for changes. Now this tax is levied only if more than half the issues in the preceding three months contained more than 7 per cent advertising.

In cooperation with the "Group Contact" of Les Escoumins, Québec, the secretariat funded a study to determine how private intermediaries can help small business. The study evaluates the operations of the Groupe Contact over three years.

The secretariat continued its program of statistical research on small business, with work on unincorporated businesses, exports of small businesses and women owner-managers. As part of this, a contract was awarded to Queen's University to interview some 200 women business owners.

Links with the international small business community were developed through such mechanisms as the International Council for Small Business (ICSB) and the International Symposium for Small Business (ISSB). A group of government officials and small business owners attended the 1980 International Symposium for Small Business (ISSB) in Australia and the ICSB meeting in Vancouver. The secretariat participated in the deliberations of the OECD Ad Hoc Group on Innovation in Small and Medium Firms which will complete its work in May 1981.

Arrangements progressed toward the 1981 International Symposium for Small Business to be held in Canada's capital, Ottawa, October 19 - 22. The symposium, to be opened by the Governor General and chaired by the Honourable Charles Lapointe, Minister of State for Small Business and Tourism, will have some 300 delegates from 66 countries. The theme of the Symposium is "Interaction" and ways will be examined which will provide small business growth and development through better interaction between small business, financial institutions, large enterprises, educational institutions, venture capital groups, labour, governments and others.

Financial Management & Services

Import Analysis Service

The Import Analysis Directorate continued to carry out import analysis based on access to detailed customs documents provided under special provisions of the Trade and Commerce Act. These analyses detail imports by size, type and end use and help industry, the provinces and ITC to identify specific development opportunities.

The reports provide data which enable industry, particularly the small and medium sized enterprises, to avoid establishing their own market research groups. Government departments use these data to help assess the effects of tariff policies and quotas and to negotiate new trading arrangements and support for industrial development initiatives of ITC and DREE.

A review of these reports indicated that over the past five years these studies have developed 5,585 new jobs in manufacturing with potential for 2,110 more jobs. This means that for every federal employee in the program, 350 jobs have been developed.

Business Opportunities Sourcing System

B.O.S.S., the joint federal-provincial program which helps identify Canadian companies as sources of supply, continued to expand its data base during 1980-81. Under the program, the provincial governments generally gather the information and the federal government enters it and maintains the file.

Information from the file is kept by the provincial governments, the federal Department of Industry, Trade and Commerce in Ottawa, its regional offices across Canada and its trade commissioner posts around the globe.

Canadian companies, governments and foreign organizations use the Business Opportunities Sourcing System to locate suppliers in Canada. For example, multi-national firms committed to offset arrangements on Canadian government contracts can use B.O.S.S. to help purchase a wide variety of products. Users also find B.O.S.S. helpful in investigation of new markets and to produce specialized directories.

Participation in B.O.S.S. is voluntary and without charge.

Corporate Systems

A computerized Import Commodity Analysis System was developed to identify for industry whether selected imported goods can be sourced competitively in Canada.

The department's International Trade Data Base System was expanded to process 15 requests a week -- up from five a week previously -- for trade data analyses, particularly in relation to Canada's trade position compared to other countries. No additional personnel was required to achieve this expanded service.

In addition, new computerized systems are being developed to improve the quality of information available in such areas as the Machinery Program, Aerospace Program, Package Tours and Tourism Resources. These new systems will be in operation during 1981-82.

The department spent \$4.2 million in 1980-81, up from \$3.6 million in 1979-80, to purchase data processing goods and services from the private sector. This is in line with government policy that electronic data processing services be purchased from the private sector except where it is in the public interest, or is more economical, to provide them internally.

Administrative Services

Administrative Services Branch continued to upgrade its communications capabilities and to implement general technological improvements throughout the branch.

This included:

- expansion of word processing centres throughout the department;
- introduction of a computerized reservations service and ticket

printing in Travel Arrangements;

- preparation and briefing sessions concerning the Access to Information and Privacy Act;
- a start on design of an automated records management system which should be completed during 1981-82;
- expansion of the micrographics;
- refinement of the correspondence control system implemented in the Minister's office and demonstration of it to other federal and provincial government departments and agencies;
- design of an electronic routing system for telegram messages.

Program Evaluation

The policy established by the department in 1978 to do comprehensive program evaluations of all its activities at least once every three to five years continued to be implemented in 1980-81.

Evaluations of the impact and effectiveness of three of the department's larger programs -- the Defence Industry Productivity Program (DIPP), the Program for Export Market Development (PEMD) and the Promotional Projects Program (PPP) -- were completed with results indicating measurable benefits having accrued from the assistance provided. Evaluation studies were initiated in two other areas of departmental activity -- the Small Businesses Loans Act (SBLA) and the Trade Commissioner Service (TCS).

In addition, the Program Evaluation Branch was involved in the preparation of evaluation plans and frameworks for a number of new departmental initiatives, as well as the existing Enterprise Development Program (EDP).

TRADE COMMISSIONER SERVICE & INTERNATIONAL MARKETING

Office of Overseas Projects

The Office of Overseas Projects, which helps Canadian companies seek contracts for capital projects abroad, concentrated its efforts on fully integrated projects in developing countries, OPEC countries, Eastern Europe and selected projects in developed countries. Projects valued at more than \$50 billion were identified, many of these in sectors where Canada has particular expertise and experience, including resource development, transportation and communications.

The office encouraged Canadian companies to form consortia to meet international competition, and provided assistance and advice in assembling competitive financing proposals.

The office, in conjunction with the Export Development Corporation and the Canadian International Development Agency, structured parallel financing arrangements which resulted in business being awarded to Canadian companies. Examples include the Bukit Asam project in Indonesia, where more than \$200 million worth of Canadian goods and services are being sold, and Phase II of the Mexico City Metro project, which has generated sales of more than \$150 million in Canadian goods and services.

The office's Cost Recoverable Technical Assistance (CRTA) program has resulted in Canada negotiating two airports and a prison complex valued at approximately \$300 million with the Government of Trinidad and Tobago.

Promotional Projects

More than \$8 million was spent during 1980-81 as the Promotional Projects Program promoted the sale of Canadian goods and services in international markets.

The program helped 931 companies take part in 66 trade exhibits. In addition, information booths were set up at 32 trade fairs. On-site Canadian sales from these initiatives were estimated at \$78 million while follow-up sales should reach \$655 million.

Approximately 320 Canadian business people participated in 44 ITC - sponsored trade missions to 42 countries. As well, 1,480 foreign businesspeople, government officials, buyers and trade delegates from 43 countries were brought to Canada.

International Marketing Policy Group

During 1980-81, the International Marketing Policy Group prepared a Canadian Export Strategy for the 1980's. The strategy established a policy direction for export marketing activities and included a detailed program of two to three year export market development plans for countries with high market potential for Canada.

The first such plan, which focused on Mexico, was discussed with representatives of provincial governments and the private sector. Further plans targeting on Latin America, the Pacific and Europe were under preparation at year-end.

Studies in export education, market intelligence, potential overseas capital project opportunities and export freedom were initiated. Work was begun in support of the new Export Trade Development Board.

Trade Commissioner Service & Canadian Regional Offices

The Trade Commissioner Service and Canadian Regional Offices operated 11 regional offices in Canada and 91 trade posts in 67 countries during 1980-81.

The 10 Business Information Centres, which are sources of information on business assistance programs of the federal and provincial governments, received 121,347 enquiries and 6,336 visitors during 1980-81.

The regional offices provided ready access to the department's trade and industrial development programs and served as a focal point for the department's relations with provincial governments.

The foreign posts impacted on trade relations, trade policy and export development. They identified export opportunities and helped Canadian firms make use of this information. These offices processed approximately 120,000 enquiries during the year, and assisted more than 26,000 visitors.

Defence Programs

The Defence Programs Branch coordinated industrial cooperation agreements with Canada's allies in the research, development and production of defence equipment. Meetings were held with Britain, the Federal Republic of Germany, Italy, the Netherlands, Norway and the United States. Increased emphasis was placed on the Canada/United States Defence Development and Defence Production Sharing Arrangements.

Defence cooperative efforts and programs identified as a result of those meetings related to high technology equipment and sub-assemblies in electronics, avionics, aerospace and land vehicles.

In addition, defence trade programs were developed with a number of friendly, non-NATO countries including Cameroon, Egypt, India, Indonesia, Malaysia, Morocco and South Korea.

Canadian defence export contracts amounted to \$855.2 million, while Canadian imports of defence equipment totalled \$533.5 million.

U.S.A. Market Development Bureau

The U.S.A. Market Development Bureau was formed in June, 1980, to continue the activities of Export Canada '79 and to act as a focal point for the department's marketing efforts in the United States.

The importance of Canada-U.S. trade was underlined by the record value of \$95.2 billion it reached in 1980. This comprised Canadian exports to the U.S. of \$46.8 billion and imports of \$48.4 billion. Canada's trade deficit was therefore \$1.6 billion.

One of the bureau's most important activities during the year was to increase the awareness of key private and public sector decision makers in the U.S. of Canada's role as the United States's most important trading partner and its potential as a source of high technology manufactured goods, as well as encouraging trade with and investment in Canada. To this end, the bureau organized a number of events bringing together senior business people and government officials from Canada and the U.S. These included seminars in Baltimore and Philadelphia, and conferences in Dallas, Minneapolis, St. Louis and Milwaukee.

The bureau also sponsored a number of regional trade promotion events to assist small and medium-sized Canadian companies to increase their penetration of the U.S. market. These included:

- an incoming furniture specifiers mission from Columbus, Ohio, organized in cooperation with the industry, the industry association and the Government of Québec, which produced direct sales of \$1 million and anticipated sales of between \$2 and \$10 million;

- gift/craft shows in New York and Boston, organized in cooperation with the respective provincial governments, which introduced 102 companies from the Atlantic provinces, Québec and Ontario to agents and buyers from the U.S.;

- an information booth at a building materials exhibition in Boston, in cooperation with the Ontario, Québec and Atlantic provincial governments, which verified the potential of the New England market for Canadian building products;

- an incoming mission of civic officials from Cleveland, Columbus and Pittsburgh to examine Canadian capability to provide building materials for urban renewal projects;

- participation by 25 Canadian companies in the Portland Solo Food Fair which confirmed a significant market for Canadian food products.

During the year, the bureau sponsored educational workshops to prepare exporters to penetrate the U.S. market for the first time or expand their sales activity there.

Besides these projects, the bureau coordinated visits by the Minister of State for Trade to Boston and Philadelphia where he met with senior businesspeople and public officials; helped in the selection of Canadian companies for other departmentally-sponsored trade events; ruled on applications for assistance under the Program for Export Market Development; and began work on development of a program to enable Canadian exporters to take advantage of new opportunities for selling to various levels of the U.S. government.

INTERNATIONAL TRADE RELATIONS

Office of General Relations

The successful conclusion of the Multilateral Trade Negotiations (MTN) in 1979 and their effective implementation during the past fiscal year mark a significant step toward liberalization of international trade. In addition to scheduled tariff cuts, the Agreements on Government Procurement and on Customs Valuation also came into force. Canada's implementation of the latter was deferred until January 1, 1985, so that the necessary changes can be made to domestic laws.

General Trade Policy

Canadian trade policies and reactions to major developments in international policy and practice were coordinated. This involved participation in trade activities of the GATT, OECD, UNCTAD and other international organizations. Activity included implementation of MTN results, north-south relations and federal-provincial trade policy consultations.

Canada participated in international policy discussions at both the general and specific levels. General issues included export financing, transportation, east-west commercial relations, competition policy and transfer of technology. Discussions were held on problems and developments in such sectors as motor vehicles, steel, ocean industries, urban mass transit equipment, energy and minerals.

Commodity Trade Policy

Canada participated in negotiating conferences to conclude new international agreements for tin, cocoa and jute, as well as in a series of preparatory meetings on tea, tung-

sten, tropical timber and hard fibres. Canada's participation in the existing international agreements on sugar, tin, cocoa and coffee fulfilled and protected Canada's consumer interests.

Agricultural concessions resulting from the MTN were implemented and the 1971 International Wheat Agreement was extended.

Office of Special Import Policy

Negotiation of restraint arrangements with major low-cost suppliers of textiles and clothing to the Canadian market continued in 1980. Currently there are 17 bilateral arrangements in effect which are due to expire at the end of 1980 (Singapore expires in June, 1982). In June, 1980, the Textile and Clothing Board made recommendations to the Minister concerning possible courses of action for the post-1980 period.

A National Chicken Marketing Agency was established and restrictions were imposed on imports of chicken. On October 1, 1980, a quota negotiated with the United States in 1979 was extended to cover breaded and battered chicken products.

In July, 1980, the quota on imports of injurious non-rubber footwear was extended for one year to allow the Anti-dumping Tribunal to determine whether these products would continue or threaten to injure the Canadian industry. The Tribunal submitted its report in February, 1981.

In keeping with the Government decision to monitor grain sales to the Soviet Union, General Export Permit No. EX 2 was amended, requiring individual permits for exports of corn and rye to all countries on the Area Control List.

cocoa beans and products were removed from the Import Control List following the expiry of the International Cocoa Agreement.

Iran was placed on the Area Control List and all shipments to Iran were controlled after the U.S. Embassy hostage incident in Tehran. Iran was removed from the list following the release of the Americans.

Specialty steel products were removed from the Export Control List.

European Bureau

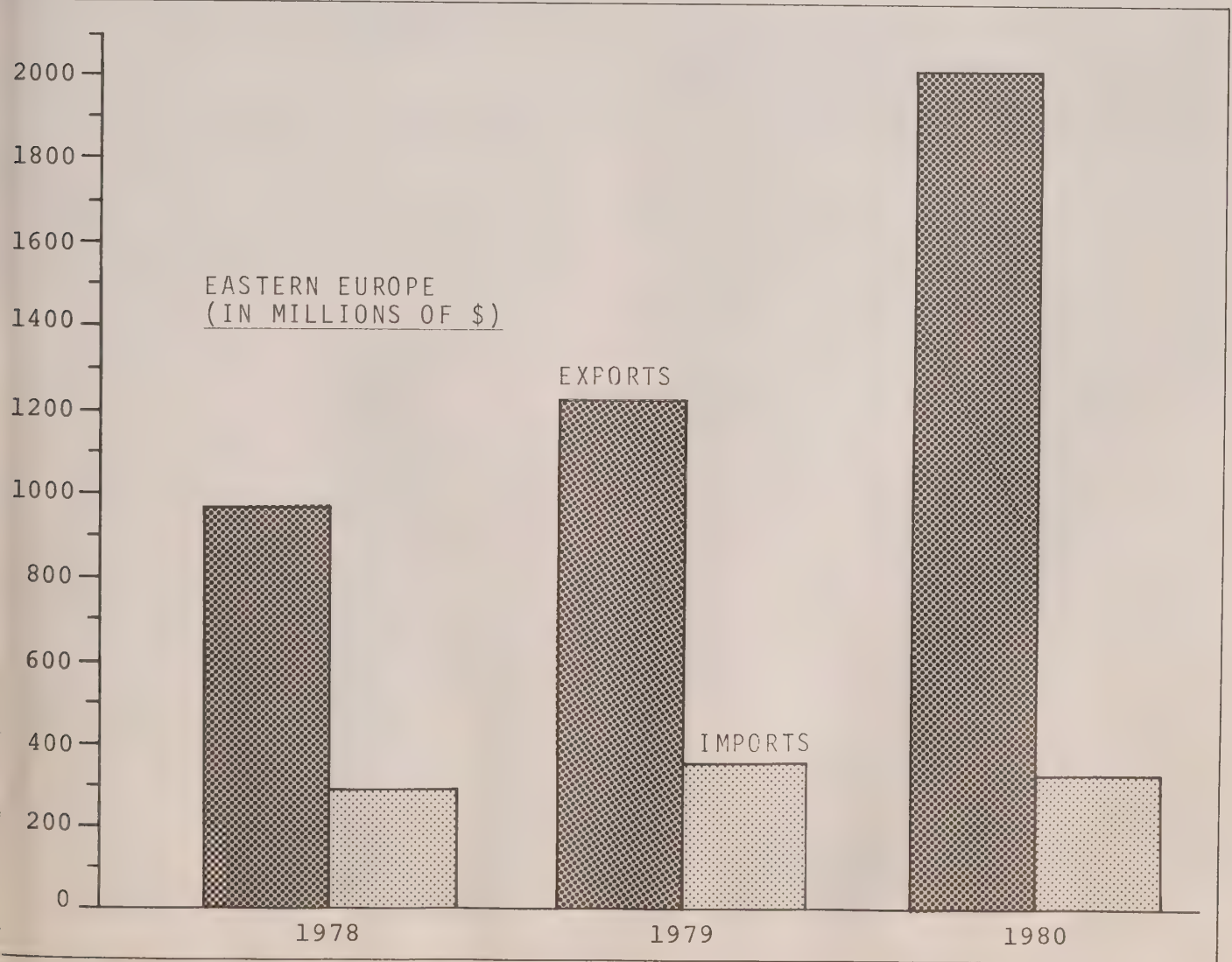
Eastern Europe

Canadian exports to Eastern Europe increased 56.7 per cent in 1980 to record \$2.1 billion. Imports

fell moderately -- \$306 million from \$327 million -- leaving Canada with a trade surplus of \$1.8 billion.

Grain sales to Poland and the Soviet Union again dominated the activity as food, feed, beverages and tobacco generated 53.7 per cent of the total. The U.S.S.R. continued to be Canada's major trading partner in the region, absorbing 72.2 per cent of Canada's sales. Trade relations with the Soviet Union were, however, affected by the decision to limit political and economic relations as a result of the U.S.S.R. invasion of Afghanistan.

Bilateral trade consultations were held with Poland, Romania and Hungary.



The department sponsored information booths at trade fairs in Czechoslovakia, Poland, Yugoslavia, Hungary and the German Democratic Republic.

Trade missions to Canada included visits by the Romanian Secretary of State for Trade and the Hungarian Secretary of State for Heavy Industry.

Western Europe

Canadian exports to Western Europe rose 33.4 per cent to \$11 billion in 1980 and imports increased only 2.6 per cent to \$7 billion. Britain continued to be Canada's largest European market, accounting for 33.9 per cent of all exports to that region.

The European Economic Community (EEC), the world's largest trading entity and Canada's second-largest trading partner, absorbed \$9.4 billion of Canadian exports in 1980.

Canadian trade with other Western European countries continued to grow as exports rose from \$1.1 billion in 1979 to \$1.6 billion in

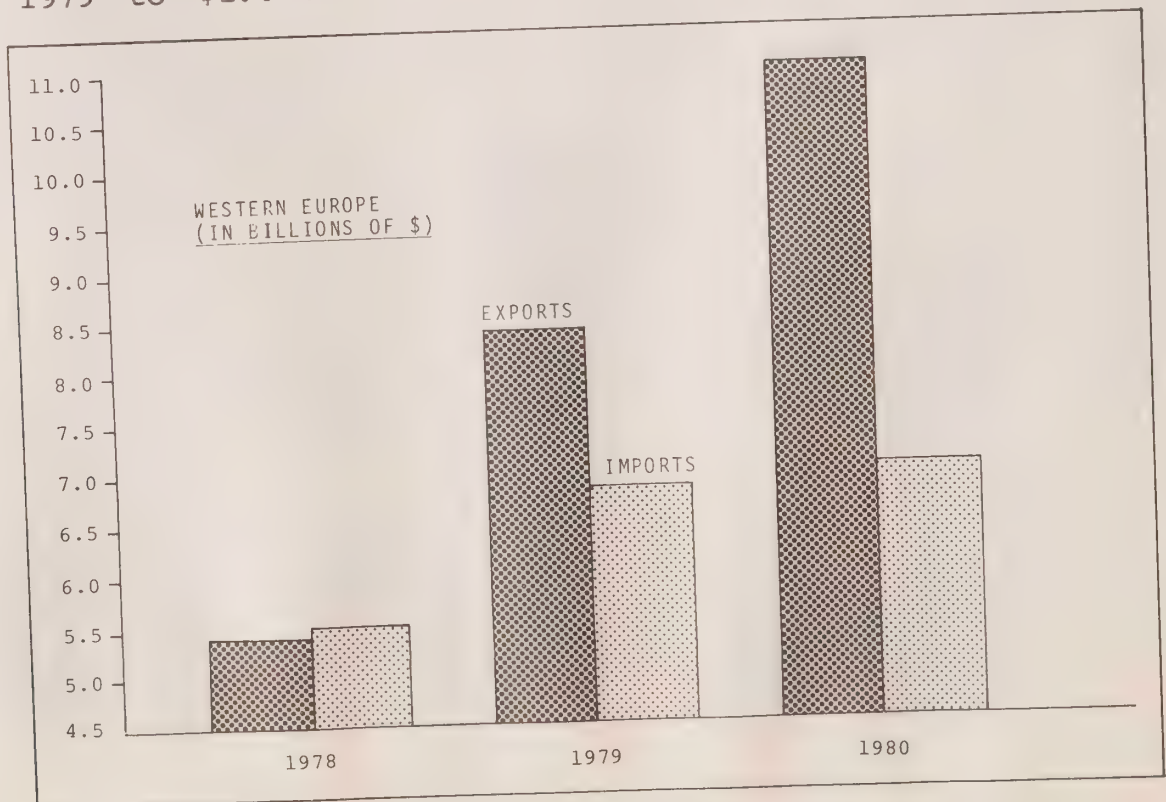
1980. Imports rose from \$1.2 billion to \$1.5 billion.

The department's initiatives toward development and maintenance of Canadian business links with the region concentrated in three broad areas: economic cooperation, market access and export promotion.

A range of economic cooperation activities continued under the Framework Agreement with the European Economic Community. Working groups of businesspeople and officials from Canada and the EEC explored possibilities for cooperation in specific industrial sectors, such as aerospace, peri-informatics and telecommunications.

Industrial cooperation activities continued between Canadian scientists and their counterparts from Sweden, Norway and Finland.

Market access discussions took place with the EEC on problems facing such specific Canadian exports as seed potatoes, newsprint, port timothy seed and steel products. Several matters affecting access to Canadian exports were raised with



the EEC and with individual countries concerning such products as cheese, high quality beef, feeder calves, synthetic textiles, seal-skins and fish.

Canada participated in 35 trade fairs in the area during the year and nine incoming and outgoing trade missions were arranged. This work represented some 36 per cent of the department's total promotional projects budget.

Meetings were held with the EEC, separate members of the EEC and other countries. Semi-annual consultations with the EEC Commission in Brussels and Ottawa and the Canada/U.K. Continuing Committee were held again. The Canada/France Economic Committee met in Paris and economic consultation was also held with the Federal Republic of Germany.

Bureau of Asian and Pacific Affairs

Asia

led by sales to China, Korea, India, Indonesia and Singapore, Canadian exports to Asia reached \$3.1 billion in 1980, a 50 per cent increase over 1979. Imports from the region increased five per cent to \$2.2 billion.

China continued to be Canada's largest market in Asia, representing sales of \$866 million. Korea, with purchases of \$504 million, was second followed by India with \$348 million. The main exports continued to be grains, metals, forest products and fertilizers. However, exports of manufactured products increased, notably to Korea and the ASEAN countries.

The Minister of State for Trade visited China, India, Hong Kong and the five ASEAN countries during the year. While there, he co-chaired the Seventh Meeting of the Canada/China Joint Trade Committee in

China with the Chinese Minister of Foreign Trade.

Canada was host to prominent officials from Asia, including the Vice Premier of China, the Indonesian Minister of State for Research and Technology, the Philippine's Deputy Minister of Energy and Singapore's Minister of Communications.

The bureau helped organize a Canada/Korea Business Council, bringing together businesspeople from both countries to improve understanding, foster closer relationships and increase trade. The Council's first meeting is to be held in Korea in September, 1981.

Pacific

Canadian exports to the Pacific showed a marked increase to \$5.2 billion in 1980-81 as compared to \$4.7 billion in 1979-80. This 11 per cent increase was overshadowed by imports which went up by 25 per cent to \$3.5 billion. However, a significant trade surplus remained in Canada's favour.

Increased automobile sales were largely responsible for the rise in imports from Japan. However, Japan remained Canada's largest market in the region and second only to the United States on the global scene.

The late Prime Minister of Japan, Mr. Ohira visited Ottawa in May, 1980, and Canada's Minister of Industry, Trade and Commerce visited Japan to meet government leaders. His visit was returned in January, 1981, by Japan's Minister of International Trade and Industry.

The Canada/Japan Joint Economic Committee held its third meeting in Banff and the two governments agreed to create a Working Group on Resource Processing. The first meeting took place in Tokyo in March.

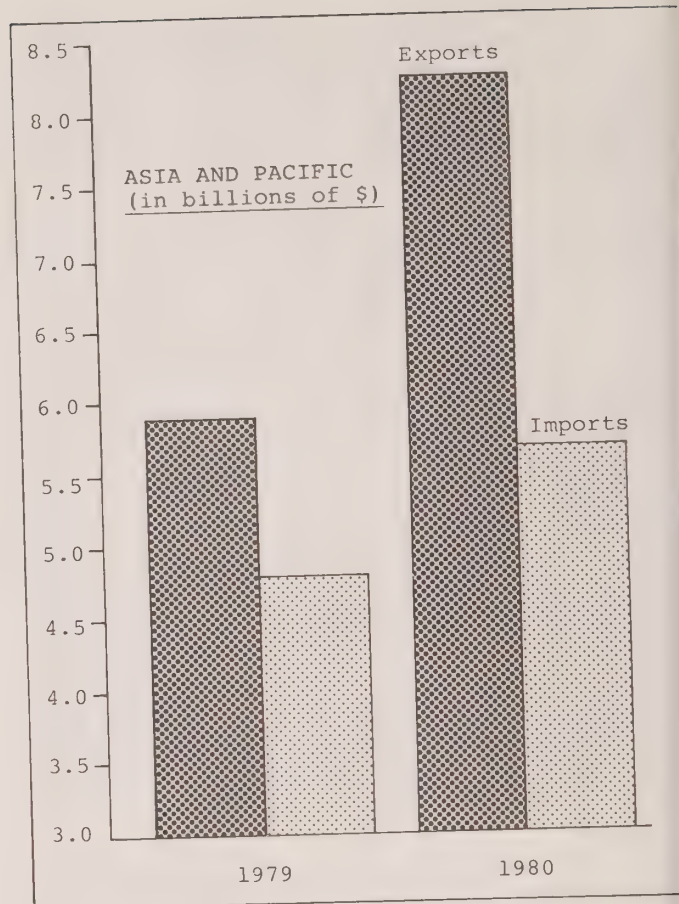
The Canadian Trade Centre in Tokyo mounted 10 shows during the year. The 81 Canadian companies which participated represented a wide range of manufacturing and high technology capabilities. Sales from the exhibits were estimated at \$20 million.

Australia continued to be Canada's fourth largest market for finished products. During the year, its Canadian purchases of manufactured goods represented one third of total imports from Canada.

In 1980, Canada-New Zealand two-way trade exceeded \$250 million. Canadian companies have recently undertaken projects in the forestry, hydro-electric and petrochemical sectors. Significant project opportunities still remain for Canadian exporters.

The Minister of State for Trade headed a delegation of 32 Canadian businesspeople to Australia and New Zealand to confirm Canadian interest in developing closer commercial ties through joint ventures and investment flows. During the mission, the Minister signed double taxation agreements with both countries and extended an Export Development Corporation revolving line of credit to the Australian Industry Development Corporation.

A November Pacific Rim Opportunities Conference, held in Vancouver under the sponsorship of the Minister of State for Trade, attracted 250 private sector leaders as well as representatives of the federal and provincial governments. The conference dealt with Canada's trade and business links with the Pacific Rim.



Bureau of African and Middle Eastern Affairs

Africa

Canadian exports to Africa reached almost \$1.3 billion in 1980, up 4 per cent from 1979. Exports to Africa now account for 16 per cent of non-U.S. destined Canadian exports, and continue to grow at a greater rate than exports to all other markets. Algeria represented the largest market, absorbing \$39 million in Canadian exports. Imports were \$529 million.

The first meeting of the Algeria/Canada Joint Economic Commission was held in Ottawa in March, 1981.

In 1980-81, the Prime Minister promoted trade during visits to Egypt, Nigeria and Senegal. The Minister of State for Trade led a mission to Egypt in February, 1981, and the Minister of State for Small Business and Tourism visited Cameroon and Gabon with a group of businesspeople in June, 1980.

A large number of missions from African countries, led by Ministers or senior officials, visited Canada for trade discussions with government and industry. Of particular importance were visits by the Algerian Minister of Trade in March, 1981, the Zimbabwean Minister of Planning in January, 1980, and a 30-member delegation of the Nigerian Chamber of Commerce in August, 1980.

The department participated in international trade fairs in Algeria, Morocco and Senegal in 1980-81.

Commercial Divisions were opened in the Canadian Embassies in Yaounde (Cameroon) and Salisbury (Zimbabwe) in August, 1980.

The Middle East

Significant expansion in trade promotion activity by the department, in cooperation with private industry, provincial governments and trade associations, resulted in exports to the Middle East of \$1.35 billion in 1980-81, a major increase over the previous year.

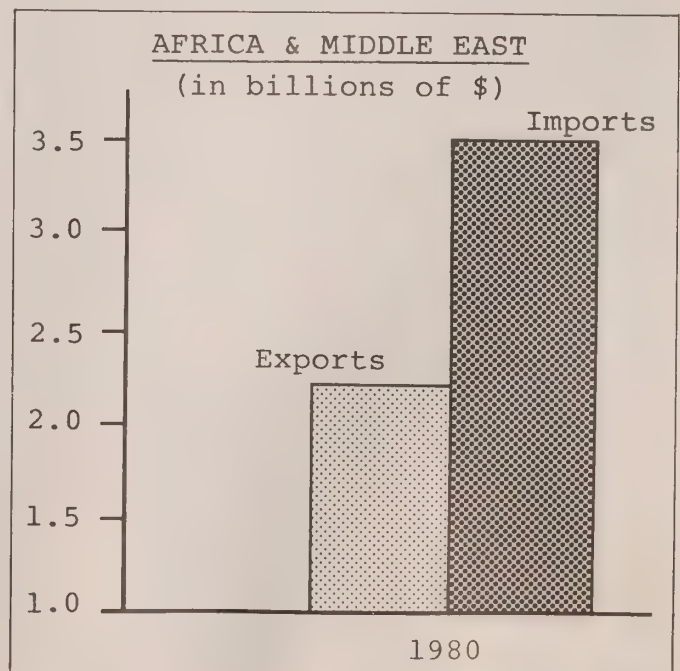
The largest market for Canadian exports in the region was Saudi Arabia (\$580 million), followed by Iraq (\$295 million). Overall imports rose to \$3 billion, principally in oil.

The third meeting of the Canada/Saudi Arabia Joint Trade and Economic Committee was held in Ottawa in June, 1980. Discussions on trade and economic relations between the two countries were highlighted by the October visit to Canada of Prince Nawaf of Saudi Arabia, and the Prime Minister's trip to Saudi Arabia and Yemen in November.

The department opened the Canadian Pavillion at the Baghdad International Fair despite the outbreak of war between Iran and Iraq. As a result, major contracts were secured for automobiles, telecommunications equipment and pipe.

Canadian export opportunities to Iran were seriously affected by the Canadian embargo on exports to that country.

The department worked with the Department of Agriculture and provincial governments in launching a series of successful marketing missions throughout the Middle East.



Western Hemisphere Bureau

United States

Two-way trade between Canada and the United States totalled an estimated \$95.2 billion in 1980. Bilateral trade in the first quarter of 1981 continued to set record levels in value terms.

In 1980, exports were \$46.8 billion and imports were \$48.4 billion. The balance of payments deficit on current account was \$8.25 billion, compared with \$7.64 billion in 1979.

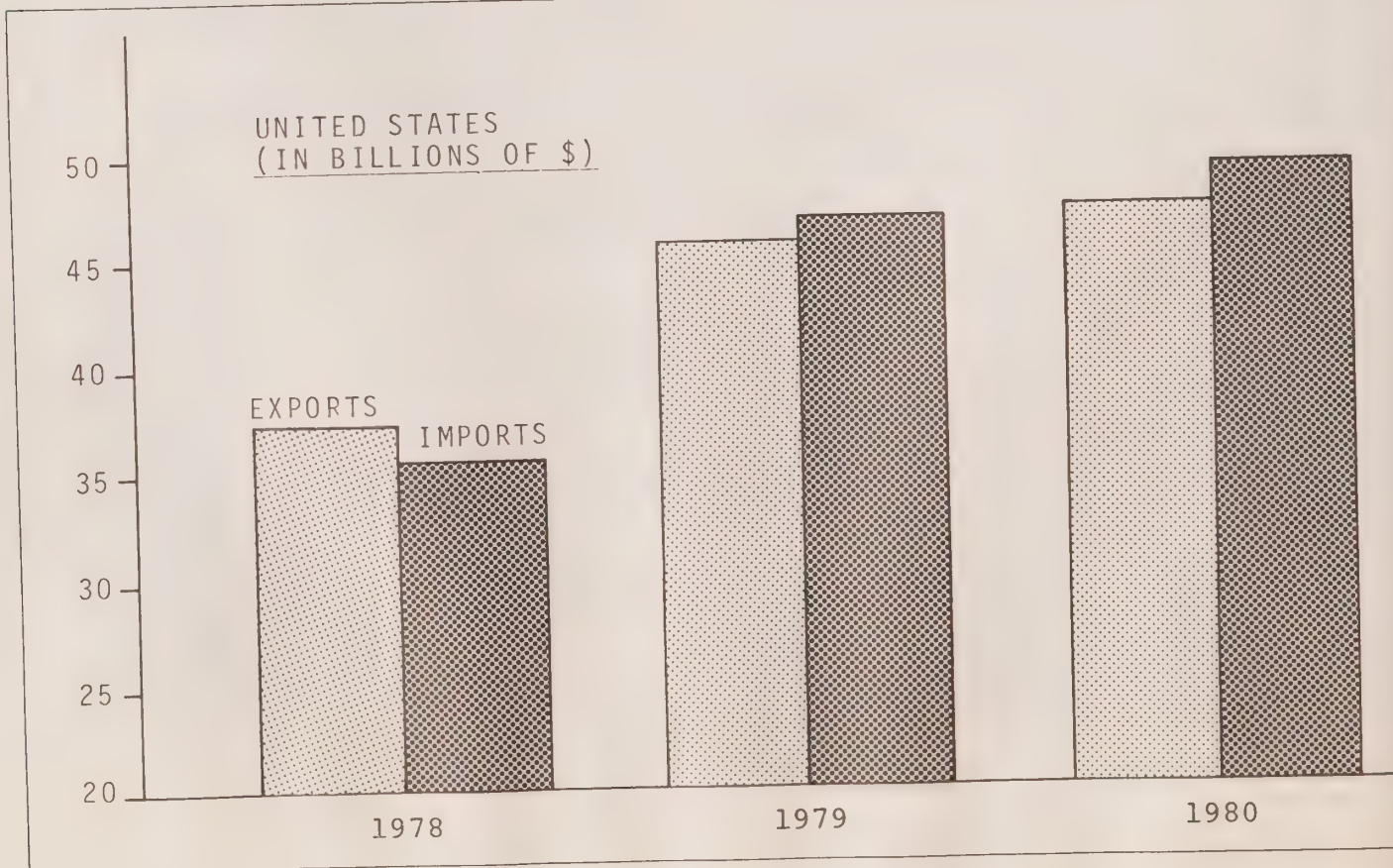
On January 1, 1981, the second of eight annual reductions in customs duties on most U.S. tariff items -- as negotiated in the GATT Tokyo Round -- were implemented and the new GATT Code on Government Procurement came into effect.

During the year, the U.S. granted Canada an exemption on tax laws

covering attendance by American citizens at conventions outside of the U.S. This is expected to have a positive effect on the Canadian convention industry.

New or expanded "Buy American" legislation at both the federal and state levels continued to seriously concern Canadian exporters, particularly in the steel and steel products sector. This sector was also affected by the re-introduction of "trigger prices" for imports of carbon steels and inclusion of specialty steel imports on a monitoring system. Both measures are related to possible initiation of anti-dumping investigations.

The U.S. Division continued to provide Canadian exporters with information and assistance on U.S. marketing. Tariff classification rulings were obtained from U.S. Customs and advice provided on labelling, food and drug and other non-tariff regulations.



Latin America and the Caribbean

A surge of growth and development in the South America, Central America and Caribbean areas led to expanded Canadian business and activity in this region.

With major markets in Brazil, Venezuela, Mexico and Cuba, exports reached \$3.8 billion -- 32 per cent more than the total in 1979. Some 40 per cent of the sales in the region were of fully manufactured goods.

In the past year, Canadian embassies in the region handled 4,700 visits by businesspeople, which was 8 per cent of all such visits to Canada's posts abroad. In addition, the offices responded to more than 22,000 enquiries from Canadian businesspeople.

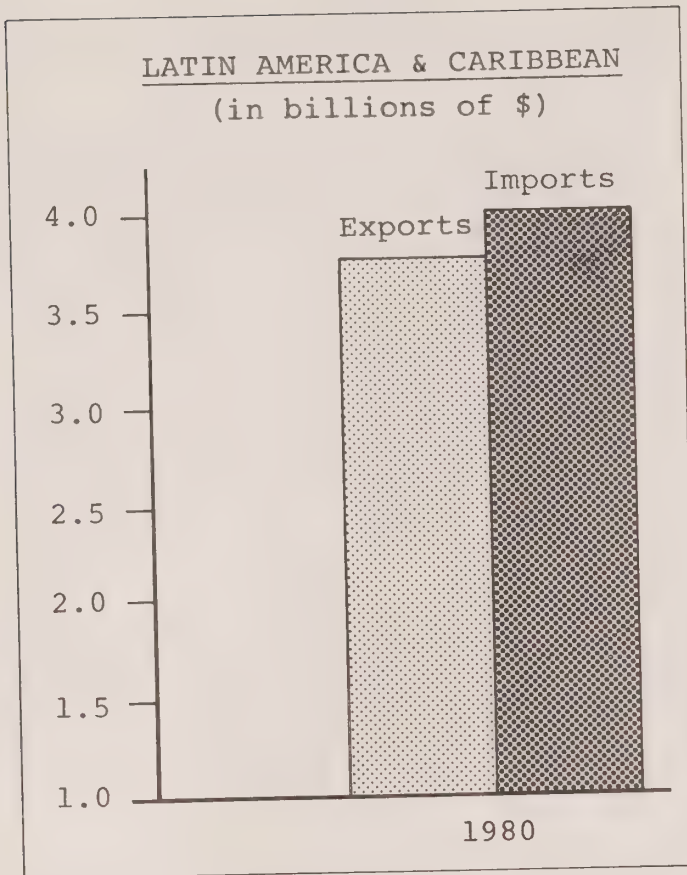
The department sponsored 27 trade missions, brought in nine groups of buyers and participated in eight trade fairs. Among these projects were: trade missions led by the Minister of State for Trade to Mexico, Paraguay, Argentina, Peru, Chile and Ecuador; visits to Canada by Trade and Economic Ministers from Mexico, Peru, Ecuador, Argentina, Cuba, Costa Rica, Nicaragua, Panama, Honduras and Guyana; the Latin America Oil Show, Rio de Janeiro; the Venezuela Solo Medical Show, Caracas; and incoming missions from Brazil, Trinidad and Tobago and Argentina to the Calgary Oil Show.

The department, together with EDC, provided marketing and financial support which helped Canadian companies obtain major contracts for projects which should yield more than \$1 billion in Canadian exports over the next few years. These contracts cover a wide range of goods and services in such fields as transportation, urban develop-

ment, power, mining, forestry, pulp and paper, communications and education.

During the year, there was considerable trade relations activity with a view to improving the environment for trade. Examples of these initiatives are: the signing of a Commercial Economic and Industrial Cooperation Agreement with Argentina; signing of an Industrial and Energy Cooperation Agreement and an Agriculture Commodity Purchase Agreement with Mexico; participation in the Canada/CARICOM Ad Hoc Working Group on Industrial Cooperation meeting in Barbados; participation in the Joint Ministerial Economic Committee Meeting in Mexico; a meeting of the Canada/Cuba Joint Committee on Economic Trade Relations in Ottawa; and participation in the Canada/CARICOM Joint Trade and Economic Committee in Jamaica.

The department continued to support the activities of the Canadian Association-Latin America and the Caribbean (CALA) and the Brazil/Canada Chamber of Commerce. This included: CALA VIII, Toronto, when the Minister of State for Trade met with Ministers from Costa Rica, Honduras, Guyana, Panama and Nicaragua; a meeting between CALA and the Caribbean Association of Industry and Commerce in Jamaica; a co-sponsored symposium on Canada's Nuclear Power Technology in Mexico City; CALA/Cuba Roundtable discussions in Toronto and Montreal on business opportunities in Cuba; and the CALA-sponsored Bilateral Businessmen's Committees with Mexico and Chile.



INDUSTRY AND COMMERCE DEVELOPMENT

Agriculture, Fisheries and Food Products

Agriculture Products

Incoming technical seed potato missions were sponsored from Venezuela, Brazil and Tunisia to support the export marketing efforts of Canadian seed potato shippers and Potatoes Canada, the Canadian seed potato export agency. Departmental personnel also participated in a mission led by the Premier of New Brunswick to promote Canadian seed potatoes in Brazil.

Two official Chinese delegations concerned with livestock production and rangeland improvement visited Canada to familiarize themselves with seed stock and technology available. China is a market for forage seed as well as beef cattle breeding stock and semen. Departmental personnel accompanied the Chinese missions.

A tour was organized for a delegation from the Japan Feed Council to meet Canadian feed grains, oilseeds and dehydrated alfalfa producers, processors and exporters and to visit research, storage and export shipping facilities.

Departmental personnel helped to organize Canadian participation in the Floralies Internationales de Montréal.

A world pulses market survey was published and distributed to the Canadian pulse crop industry. A Canadian display featuring pulse crops was organized in the Algiers Trade Fair.

During the year, buyers were sponsored from several countries, including Romania (forage and oilseeds) and Venezuela (pulse crops and popcorn).

Two additional working papers, on Agricultural Export Assistance Programs and Breeding Swine and Semen, were completed for the Export Trade Promotion Committee. Meetings were held with provincial government officials on these studies and action plans were prepared.

Livestock, Meat and Dairy Products

Promotion of cattle, swine, semen and embryos continued throughout the year. Exhibits were held in the Salon International de l'Agriculture, Paris, the Royal Highland Show, Edinburgh, and the Royal Easter Show, Sydney. Special exhibits were undertaken in the Porto Algere Show, Brazil, the Palermo Show, Buenos Aires, and OMEK (Hungarian Agriculture Exposition) in Budapest.

Trade missions were brought to Canada from the United Kingdom, Korea, the People's Republic of China, Bulgaria and Malaysia. The Malaysian mission was devoted solely to swine and swine production as a follow-up to the previous year's swine mission to South East Asia.

The department has encouraged increased Canadian participation in tendering for high quality beef for Japan. It has also sought improved access to the high quality beef quota of the EEC.

As a result of departmental efforts, the industry made major sales of pork to Europe. Sluicagate pricing levels presented problems in the EEC and sales were curtailed for the last half of the year.

The department sponsored an incoming Italian pork buyers mission. A pork mission to Panama, Venezuela and the Dominican Republic demonstrated the potential for sales in these markets.

Canadian raw furs were promoted by participation in international fur fairs in Frankfurt, New York and Madrid.

Grocery Products

A trade mission visited the Middle East in December, 1980, to survey the food market potential in Saudi Arabia, United Arab Emirates, Kuwait and Egypt. In March, 1981, a study mission to the Far East and Australia exposed opportunities for Canadian processed fruit and vegetable products. An industrial co-operation mission, composed of a branch official and executives from seven companies, visited France to exchange information and discuss licensing arrangements.

Following the successful participation of Canadian companies at the Salon Internationale de l'Alimentation (S.I.A.L.) food show in Paris, November 17 - 22, 1980, recruitment for ANUGA '81, to be held in Cologne, the Federal Republic of Germany, October, 1981, produced 32 companies. Other companies are on a waiting list.

During the year several promotions were held in the United States, including solo food and beverage fairs in San Francisco, Buffalo, Cleveland, Minneapolis and Portland, and retail in-store promotions in Cleveland and Minneapolis. There was also participation in the Washington State Food Dealer's Convention and the Canadian Seafood, Food and Beverage Expo.

The branch was represented at all the meetings concerning International Commodity Agreements (cocoa, sugar and coffee). The International Cocoa Agreement of 1975 lapsed and a new agreement was reached, but not ratified, in October, 1980.

Fisheries & Fish Products

The department helped finance the North Atlantic Seafood Association's promotion of groundfish consumption in North America.

Thirty-two companies from Canada including 21 fishing companies participated at the S.I.A.L. food show in Paris. Onsite sales were more than \$7 million. Potential resulting sales for the following year were estimated at \$150 million.

Programs

Financial assistance was provided for a large number of sector-specific initiatives under the various sections of the Program for Export Market Development (PEMD). These ranged from market identification trade fair and incoming buyer projects to more specialized activities available under PEMD "R", section of the program established specifically to address the specialized export constraints and opportunities facing the agricultural, fisheries and food product sector. Activities under PEMD "R" covered: a training program for foreign buyers of Canadian agricultural products; assistance for the certification of Canadian seed varieties in overseas markets; and bid preparation for a large scale Chinese agricultural project.

Industrial development needs of the sector have been pursued under the Enterprise Development Program (EDP). Approved projects have ranged from the development of process for the production of single cell protein from waste cellulosic material to the expansion of a fish processing plant with a unique North American product capability.

The branch also assisted non-departmental programs, including the New Crop Development Fund and the Unsolicited Proposals Program.

Chemicals

The chemicals and related products sector covered by the branch was responsible for shipments of \$17 billion in 1980, and employed 150,000 persons in more than 3,000 establishments. The sector is in a position to overcome its traditional trade deficit position, with current export and import levels close to \$5 billion each. This represents a dramatic reversal of a trend toward larger deficits in chemical trade during the last decade.

Health Care Products

Arrangements were completed for a manufacturing opportunity show on medical equipment and suppliers to be held in Winnipeg in April, 1981, as part of a major federal-provincial initiative to secure a greater share of the domestic market. In 1980, domestic production from the sector supplied about 25 per cent of the \$1.2 billion domestic market.

During the year, the branch organized participation in the International Medical Salon in Algiers and Medica 80 in Duesseldorf. As well, the branch sponsored incoming buyers from Venezuela and senior executives of an American hospital management firm. Both groups visited Canadian companies to assess domestic manufacturing capabilities.

Coincident with Medica 80, an industrial cooperation mission of 11 companies and the Canadian

Association of Manufacturers of Medical Devices visited German government agencies and interested firms concerning possible joint ventures, technology transfer and licensing agreements.

In March, 1981, a mission was mounted to four south-east Asian countries in support of export activity of the Canadian biological industry. Discussions were held to establish Canadian capability to participate in joint ventures and licensing arrangements for vaccine concentrate manufacturing facilities.

The branch also considered various policy options which addressed issues raised in the Health Care Products study published the previous year.

Plastics & Chemical Specialties

Exports in the plastics processing industry increased by almost 15 per cent in 1980 as compared to the previous year.

The branch participated on a number of committees of the Society of the Plastics Industry of Canada (SPIC), addressing issues such as improved management information, industry competitiveness and export promotion.

A study on the feasibility of establishing a Plastics Institute was completed in 1980, and an industry group is now preparing a proposal which outlines options for forming such an institute.

In cooperation with SPIC, an export seminar entitled "The U.S. Market" was arranged for plastics processors. In addition, the department sponsored selected buyers from the

U.S. to attend the annual plastics show in Toronto and to meet with domestic plastics processors interested in exporting. A selling mission in March, 1981, introduced eight Canadian processors without previous export experience to the Philadelphia regional market.

In November, 1980, the branch led an industrial cooperation mission to Italy and the Federal Republic of Germany. This included attendance at Plast 80 in Milan, which acquainted Canadian plastics processors with the latest European technology for plastic building components.

Work was advanced on a study of the pesticides industry in Canada, with completion of the report expected in the next fiscal year.

Industrial Chemicals

A major focus during the year concerned a review of the petrochemical sector and of the federal government's petrochemical policy. A survey of the supply-demand outlook for major components of the petrochemical industry was also conducted.

The branch participated in meetings of the Canada/Japan Joint Economic Committee (J.E.C.) to discuss petrochemicals and represented Canada at the assembly of the International Rubber Study Group in Kuala Lumpur, Malaysia.

In anticipation of government measures addressed to the acid rain problem, the branch initiated work on how industry can use the additional quantities of SO₂ expected to become available.

The branch continued its development of computer simulation techniques to measure the impact of po-

licy proposals on the industry's international competitiveness.

Electrical and Electronics

Policy & Strategy Development

An electrical industry strategy paper, "Towards the Electrical Economy", was released and consultations were held with provincial and private industry representatives. Work was begun on an electronics industry strategy paper to be released next year.

The "Office of the Future" concept received attention through the \$1.1 million Office Communications System project of ITC and the Department of Communications (DOC). Further development of the major projects and microelectronics support elements of the Special Electronics Fund was undertaken.

Microelectronics & Instrumentation

Under the \$30 million major projects section of the Special Electronics Fund, activity continued on the \$21 million project with Mitec Corporation. A new allocation was made for a \$7 million project with Sentrol Systems Inc. Activity continued in the implementation of the \$20 million Microelectronics Support Program and initial applications from industry were received and evaluated. Selection of universities for regional microelectronics centres of excellence was also pursued.

The sector profile of the instrumentation industry was distributed to approximately 300 companies. The profile consisted of studies on industrial process control, building automation, medical electronics, scientific and laboratory instruments, test and measuring equipment, remote sensing and mea-

asuring equipment, remote sensing and environmental instrumentation and geological, geophysical and geotechnical apparatus.

Information Processing & Technology

The department concentrated its efforts in providing product development and export market development funds to small firms and in using government procurement as a means of obtaining product mandates from multinationals.

Market promotion activities included participation in several European trade fairs and a computer technology mission to the Far East.

A detailed report on the computer industry was prepared and several measures are being explored to reverse the negative trends in the trade deficit.

Consumer Products

The Television Duty Remission Program, administered by the department and instrumental in a successful restructuring and diversification of the industry, ends December 31, 1981. A new remission and tariff program for the next five years is being formulated in consultation with the industry.

Telecommunications

Telidon was promoted aggressively in international markets, where strong competition from the U.K. (Prestel system) and France (Antiope system) is being experienced.

Canada remained active in the space market in 1980-81, with firms pursuing contracts in Australia, Brazil, the Middle East, Europe, the U.S. and elsewhere. A full review of the Government's involvement in these activities was undertaken during the year by an interdepartmental task force.

During the year, DIPP provided support to telecommunications product development in space and related terrestrial communications, while EDP projects supported various developments in digital microwave, satellite TDMA, mobile radio telephone systems and digital broadcast studio switches. The Telecommunications Division provided marketing support to firms engaged in major telecommunications export projects in Australia, Peru, Mexico, Central America and the Middle East.

Avionics and Defence Electronics

Projects for development of high technology production and modernization of production facilities were supported by the reopened and expanded DIP program. Total DIPP spending was \$46.5 million, of which \$31.7 million was for the Cruise Missile Project. This was a major support project for second source production of inertial navigation units for the U.S. Cruise Missile program. The potential benefits to Canada are very large, and the project results to date have verified original expectations.

Ten companies participated in the Military Electronics Defence Expo in Wiesbaden, the Federal Republic of Germany in October, 1980. Government, procurement, military and industry representatives from over 70 countries took part. The Canadian stand was supported by the Defence Programs Branch with the assistance of the Electrical and Electronics Branch.

Increases in industrial benefits and procurement review activities continued during 1980-81, and are expected to grow dramatically in the future. The division was involved in 38 Procurement Review Committees and four major Crown projects. These were the CP-140 Aurora, CF-18 Hornet, the Canadian

Patrol Frigate and the Radar Modernization Program.

Textiles and Consumer Products

Textiles

Significant gains in production were achieved by many textile sub-sectors during 1980. The industry benefitted from the level of the Canadian dollar and restraints on selected import products. However, recessionary conditions did affect double-knit fabrics, velour produced on single-knit machines, woollen fabrics, man-made lining fabrics, glove fabrics, corduroy fabrics, footwear and upholstery fabrics and carpets.

New capital expenditures in 1980 amounted to \$162.9 million, compared to \$127.5 million the previous year. Expenditures for modernization represented 89 per cent of total investments.

The staff of the Textiles Division participated extensively in the development of a sector policy and assistance program for the textile and clothing industries in the 1980s.

Imports decreased by five per cent in 1980 as compared to 1979. Canadian export activity remained strong throughout the year, as exports reached \$423 million, an increase of 26.4 per cent. Canadian textile shows abroad have contributed to the success of the industry in Europe, Japan and Central America.

Clothing

Domestic shipments of clothing products increased 4.7 per cent in dollar value during 1980, but in real terms output declined. Imports shared the downtrend, dropping 2.3 per cent in dollar terms and more than 15 per cent in units.

Exports increased by 21.2 per cent in comparison with 1979, to \$230.2 million.

During the year, the division developed a sector policy to encourage the industry to continue to modernize, restructure and improve efficiency in response to external and domestic economic forces.

The department provided 13 companies with guaranteed loan assistance totalling \$3,552,500. In addition, approval was given for grants of \$63,255 for two productivity feasibility studies, and of \$231,619 for seven innovation projects.

With financial support from the department, Canadian apparel was displayed at eight promotional trade shows. The highlights were:

- on-site sales of \$5.5 million of fur garments in New York City;
- active sportswear sales of \$2.81 million in Munich and Las Vegas;
- ITC involvement brought 208 buyers to the Canadian Outerwear Fashion Fair in Winnipeg, generating on-site sales of \$1.8 million;
- similar support brought 130 buyers from the U.S., the U.K. and Europe to the Children's Apparel Manufacturer's Association Show, producing on-site sales of \$1.1 million.

The department extended its financial support of the productivity program in Manitoba for three years. Similar programs are being developed in Ontario and Québec.

Fashion Office

The department applied the Canada Employment and Immigration Commission's Summer Youth Employment Pro-

gram to provide 78 students of fashion design with practical work experience in the summer months. This provided training and employment opportunities to the students, and introduced 65 clothing manufacturers to the talent becoming available in Canada.

The Fashion Design Assistance Program again supported a showcase of Canadian designer fashion for men, women and children. The Trend Show was extended to Winnipeg in conjunction with the Canadian Outerwear Fashion Fair.

The third issue of the magazine "Canadian Fashion-Mode", supported by the department, was distributed outside Canada, producing direct contact with manufacturers and visits by overseas buyers.

Footwear and Leather

The value of shipments in the footwear industry increased by eight per cent in 1980 to \$712 million as compared to 1979. However, output declined 11 per cent from 47.8 million pairs in 1979 to 42.3 million pairs in 1980. Per capita consumption declined from 3.26 pairs to 3.19 pairs.

The industry's exports increased eight per cent from \$61 million to \$66 million in 1980. The volume of exports rose three per cent to 4.2 million pairs as the industry, with branch assistance, continued its drive to obtain additional business abroad. Ice skates and other specialty footwear were the most popular lines.

The dramatic surge in leather prices experienced in 1979 abated in early 1980, and the leather price index eventually fell 21 per cent from its 1979 peak. As a result, the wholesale price index increased by only nine per cent in

1980 over 1979, compared to an increase of 18 per cent in 1979 over 1978.

The global quota on leather and vinyl footwear imports was extended on November 30, 1981, while the Anti-Dumping Tribunal investigated the situation. The Tribunal report, issued in February, 1981, concluded that while the Canadian industry's ability to compete with imports from developed and state trading countries is adequate, it will be seriously injured in the absence of special measures of protection from imports from low wage countries such as Taiwan, Hong Kong, Brazil, South Korea and India.

The Footwear and Tanning Industries Adjustment Program, introduced in 1974 to assist the industry to increase its competitiveness, expired on March 31, 1981. During the term of the program, 59 cases were approved for operational audit assistance grants and 35 cases were supported by grants for restructuring and consulting. Grants approved under the program totalled \$3.7 million, and 14 loans totalling more than \$15.5 million were approved. The program is being reviewed by the department.

The Footwear and Leather Institute of Canada, which operates with departmental support, is being strengthened by new membership and by the enlarged scope of services offered to the industry.

Furniture

The department continued to emphasize the development of export markets as a means of improving the furniture industry's performance.

The business furniture sector held six shows in U.S. cities and sponsored two incoming missions of

U.S.-based architectural specifiers, environmental space planners and interior designers.

Twelve residential furniture manufacturers are exhibiting at the Southern Furniture Market in North Carolina. At the same time, the rapid growth in imports of furniture experienced in recent years has subsided to less than five per cent per year.

Total furniture shipments exceeded \$2 billion in 1980, a 10 per cent increase over the previous year. Assistance provided under the Enterprise Development Program has enabled many firms to undertake restructuring and productivity improvement projects.

Musical Instruments

Nine manufacturers of musical instruments, accessories and related sound equipment participated for the first time with the department at Musikmesse, an international trade fair in Frankfurt, West Germany. On-site sales amounted to \$790,000 and follow-up business is expected to exceed \$4 million.

Leisure Industries

The leisure industries sector continued to enjoy good market conditions during 1980, with shipments reaching an estimated \$7.5 billion, an increase of close to 20 per cent over 1979. Exports increased by 27 per cent to almost \$450 million. Shipments to the U.S., the largest export market, grew by about 25 per cent while exports to the EEC increased by more than 40 per cent.

Major departmental activities included the organization of an export seminar tailored to the needs of jewellery producers; participation in 10 international trade fairs and solo shows in the U.S.,

the U.K., France, the Federal Republic of Germany, Italy, Australia and Japan; and the organization of three incoming buyers missions.

Transportation Industries

Aerospace directorate

The directorate sponsored major new ventures such as the DASH-8 turbo-prop commuter aircraft, the PT-7 engine, a further phase of advanced development with the Augmentor Wing Program and enlargement of the Computer Aided Design/Computer Aided Manufacturing capability.

Monitoring activities continued for established projects such as the Challenger, the DASH-7, engineered products and military reconnaissance drone systems.

Negotiations continued under GATT to expand the freedom from duties afforded aircraft and engine parts in overseas markets under the terms of the Agreement on Trade in Civil Aircraft.

Management and audit intensified of established industrial benefit packages (offsets) negotiated as part of major contracts. These included the CP-140 Aurora LRPA, the NATO AWACS and the CF-18 NFA.

The directorate maintained responsibility for Crown-owned Canadair and de Havilland.

The aerospace sector expanded during the year, with sales at record levels and employment at a decade-high. The industry is predominantly export-oriented and made major contributions to Canada's balance of trade in manufactured goods.

Ships & Components

The value of the shipbuilding order book reached a record high in 1980,

with deliveries scheduled to 1984, although the orders are not evenly distributed. On applications received after July 1, 1980, construction subsidies under the Shipbuilding Industry Assistance Program reverted to nine per cent, as the temporary rate of 20 per cent was not extended.

Ship repairs and conversions, valued at \$207 million, were 14 per cent higher than in 1979. Foreign vessel repairs accounted for 19 per cent of the total, reflecting improvement in the industry's competitive position. The department continued to assist in the upgrading of dry docks and other facilities.

Automotive

General

The automotive industry in Canada is predominantly oriented to supplying the U.S. market. There was a marked increase in U.S. consumer preference for offshore vehicles, primarily Japanese, resulting in a significant reduction in automotive production in Canada compared with the previous period.

While the domestic market declined in 1980-81 as compared to the previous year, the penetration of imports into Canada did not. In fact, imports showed a marked increase in the percentage of the Canadian market they controlled.

The department continued to work with vehicle manufacturers to induce incremental investment and additional sourcing in Canada.

Parts

The trend to the world car and to worldwide sourcing of components has required the Canadian parts industry to become more prominent

in world markets. The department took an active role by organizing missions to various countries and by sponsoring exhibitions. In addition, substantial effort was devoted to the Japanese market to encourage both purchases from and investment in Canada. The department also worked closely with vehicle manufacturers to increase Canadian sourcing of auto parts.

A major study was initiated to obtain a better understanding of the size of the Canadian aftermarket and of the relevant issues.

The department worked closely with all parts manufacturers to increase R&D, investment and production.

Ocean Industries

The requirement for Canadian ocean industry companies to export in order to secure adequate markets was reflected in national stands at the Offshore Technology Exhibit at Houston, at Europec and at the Canada Trade Centre in Japan. A mission to Australia confirmed market potential in that area.

Strong interest continued in ocean technology development and improved equipment performance in offshore exploration and surveying. A number of development proposals submitted by companies are being analyzed to determine if cost-shared support can be offered by the department.

The division worked very closely with the recently established Canadian Ocean Industries Association.

Exploration for oil and gas in the Beaufort Sea and offshore Atlantic regions continued to yield positive results, reinforcing the expectation that activity in the ocean industries sector which supplies the necessary equipment and services will continue its rapid growth.

Rail

The Railway Systems Division assisted industry in the development of new technology and equipment to improve railway efficiency and productivity. Shared-cost research and development projects supported under the Enterprise Development Program include:

- the development of a high-speed ballast regulator by Bert Pyke Ltd. The prototype unit is currently undergoing field testing on CN track and series production will commence in the fall.
- the development by Canron Inc. of a high-speed tamper capable of increasing tamping productivity by a factor of four. The prototype is currently undergoing field testing. It is anticipated that this new equipment will have annual sales of approximately \$2 million.
- the development by Bert Pyke Ltd. of an 18-ton hydraulic crane for railway use. This unit satisfies a domestic requirement and replaces imports. Four units have been sold to date.
- the development of an advanced technology diesel electric freight locomotive by the Rail and Diesel Products Division of Bombardier Inc. This locomotive, specifically designed for the Canadian environment, will be capable of performing 40 per cent more work than currently available locomotives. The Enterprise Development Program will contribute 50 per cent of the \$54 million project cost.

The department maintained its membership in the Pan American Railway Congress Association (PARCA) and

supported the creation of the Canadian Railway and Transit Manufacturers Association (CRTMA). The Association has since established industry positions regarding tariffs, R&D requirements and the domestic market.

Office of Service Industries

Construction & Consulting Services

The Construction Division continued to direct its efforts towards furthering productivity and improving international marketing of the construction and renewable energy industries.

Highlights included:

- preparation of guidelines for implementing procurement review of federal government construction projects. This program seeks maximum participation for Canadian firms in these projects.
- completion of a preliminary profile on the organization and activities of Canadian real estate developers in Canada and the U.S.
- providing a departmental focal point for activities concerning renewable energy systems, including representation on several interdepartmental committees. The division assisted in the organization of the International Symposium on Solar Energy Utilization and participated in the annual meetings of the Solar Energy Society of Canada Inc. and the Canadian Solar Industries Association. A "Blueprint for Solar Energy Exports" involving selected markets in the Caribbean and the U.S. was completed in cooperation with the Solar Industries Association.

- investigation of market opportunities in Zimbabwe and organization of a construction/mining/engineering mission to that country in September. The industry and government of Zimbabwe responded with missions to Canada in November, 1980, and January, 1981.

- investigation of market opportunities for prefabricated building manufacturers to provide relief to earthquake victims in Algeria and Italy. These efforts resulted in \$100 million of exports.

- support of the ongoing export efforts of Canadian contractors in developing countries, resulting in some \$300 million in overseas contracts.

- establishment of the Canadian Construction Management Development Institute to provide a national focus for coordination of construction management training and development by determining common industry needs, promoting the benefits derived from improved management capability and developing appropriate national accreditation programs.

The Consulting Services Division promoted Canadian consultants in the international market. Domestic issues affecting the industry were also addressed.

The division participated in the annual meetings of several associations, including the Association of Consulting Engineers of Canada, the Royal Architectural Institute of Canada (RAIC) and the first annual meeting of the Association of Architects in Private Practice in Québec. During the year, five meetings of the Association of Consulting Engineers/the Department of Industry, Trade and Commerce Liaison Committee were held, implementing a broad program of work, including the commissioning of an up-

date of the 1979 study of consulting engineering in Canada.

The division assisted in the formation of liaison committees with the RAIC and the Canadian Consulting Agrologist's Association. In cooperation with the Department of Fisheries and Oceans (DFO) and the Canadian Hydrographic Service, the division helped industry form the Canadian Association of Hydrographic and Ocean Surveying Industries (CAHOSI).

A number of meetings of the Computer Aided Design (CAD) Review Committee were held. The committee's report includes a series of recommendations regarding the future of the Public Works Canada-Computer Aided Design Centre and CAD development in Canada.

A consultative committee on the Canadian consulting engineering industry was established by the Minister of Industry, Trade and Commerce. The committee is comprised of 15 senior executives from industry and observers from each of the provinces. It will review the current status of the industry, assess its potential in Canada's economy and the constraints it might face in realizing this potential, and report to the Minister on possible future courses of action.

The Minister of State for Trade chaired a conference in Ottawa to discuss the potential for exports of Canadian manufactured goods arising from overseas contracts obtained by Canadian consulting engineers.

The division participated in an incoming Belgian engineering mission to discuss third country cooperation; a fact finding mission to Latin America to explore market opportunities for consulting engineers and aerial surveyors; and a fact finding mission to ASEAN

countries to explore market opportunities for consulting firms.

During the year, the division had a heavy commitment to exports through sourcing requests and PEMD. Seventy international consulting contract successes, some of which received PEMD assistance, were reported.

The Advisory Committee on Industrial Benefits from Natural Resource Development held several meetings during the year, with operational staff drawn from the Capital Projects Division. There has been a significant increase in domestic involvement in the supply of equipment and services to Canadian resource development projects.

The division also provided the secretariat for the Major Projects Task Force established in 1978. This Task Force consists of some 35 representatives from the business community and an equal number from labour. Most of the provincial governments have appointed an observer. The Task Force's work has been virtually completed, and its final report will be submitted in June, 1981.

The Capital Projects Division was responsible for implementing the department's strategy for obtaining the greatest benefits for Canadian industry from domestic projects. Discussions were held with resource development firms sponsoring major projects to ensure that these projects provide Canadian-based industry with opportunities to participate and contribute to the development of independent, ongoing firms in the manufacturing and service industry.

Distribution Services

The Wholesale and Retail Division continued to develop data on the structure and performance of the distributive trades.

Productivity was identified as an area of considerable interest and a new approach and methodology was developed to solve deficiencies in the existing measurement system.

Data deficiencies were identified as a problem and several studies were conducted to collect information. The division assisted associations to run their surveys, with the department obtaining access to the resulting data.

Two studies were put in place to examine expansion of export activity. One pursued exporting by wholesalers to wholesalers, while the second focused on buying groups exporting to buying groups.

An assessment of the level of management expertise possessed by the sector was obtained, together with departmental programs designed to cope with this problem in other sectors.

The division provided liaison with the cooperative movement in Canada and extensive consultation took place with this segment of the trade sector.

A sector profile on the distributive trades was completed and will be used as the working document for the Consultative Committee on the Distributive Trades in 1981-82.

The division ensured that the role of the distributive trades is taken into account in the government policy formulation process. This involved the proposed legislation for the transportation of dangerous goods, proposed changes to the excise tax act, the textile and clothing review and policy formulation process and the Anti-dumping Tribunal review of footwear.

Merchandising Services

Considerable interest was focused on the trading house sector during

the year, with the formation of the Parliamentary Committee on a National Trading Corporation.

The division's research indicated the need to increase awareness of the advantages of using trading houses for export. Accordingly, a Directory of Canadian Trading Houses was developed for use by manufacturers and the department; a series of articles was published on the trading house concept; the first in a series of seminars on "How to Use a Trading House" was co-sponsored with the Canadian Manufacturers' Association; and the first trade mission for trading houses only was organized for March, 1981.

A trade mission to Trinidad, Colombia, Ecuador and Peru resulted in a number of immediate contracts for Canadian products. The six trading houses have submitted tenders on large contracts, and further export efforts are planned.

The division completed a study of the automotive aftermarket to be incorporated into the study currently underway in the Transportation Industries Branch.

The division also continued its seminar program on franchising. Seminars on how to successfully develop franchise systems and how to buy a franchise were held in several cities in conjunction with provincial governments, Boards of Trade/Chambers of Commerce, Le Conseil Québécois du Commerce de Détail and the Association of Canadian Franchisors.

More than 3,000 franchise information kits were distributed in 1980-81.

The statistical study of franchising being done by Statistics Canada entered its final stages during the year. Preliminary re-

sults indicate annual Canadian sales in excess of \$15 billion for franchise systems, and strong upward growth trends. More than 500 franchise systems operate upwards of 21,000 business units in Canada.

A trade mission of nine Canadian franchise firms went to Japan in February, 1981, and met with 300 Japanese businesspeople at the Canada Trade Centre in Tokyo. The nine firms included a tool manufacturer/distributor, a dairy/convenience store system and a roller skating rink franchise system. Negotiations with interested Japanese firms are now underway in an effort to add to the three Canadian franchise systems now operating in Japan.

A consulting/planning system for establishing buying groups was developed by the division.

Maritime Transport Services

The branch participated in the UNCTAD Committee on Shipping, concerning UNCTAD initiatives affecting Canadian trade which include the imposition of cargo sharing in bulk and liner trades, phasing out of flags of convenience and the modernization of marine insurance contracts. Other issues included arctic shipping, merchant marine policy, bilateral shipping relations, cost recovery, shipping legislation, regulation of shipping conferences and requirements for transport infrastructures.

The branch consulted with individual shippers, shipping companies and industry associations in contributing to policy deliberations from the point of view of transport users. Assistance was provided to such transport service industries as the marine insurance industry and to Canadian shipping companies establishing services to Latin America.

Air Transportation Services

The branch continued to represent business travellers', shippers' and the tourism industry's interests in air policy issues. These included STOL services between Montreal, Ottawa and Toronto; domestic air carrier policy; Canada/U.K. and Canada/U.S. air services negotiations; competition policy; and energy policies affecting air services.

The C.T.C. review of regulations governing the use of corporate aircraft was monitored in anticipation of further activity.

The branch's study on the potential for a Canada-Colombia/Venezuela air service was distributed to the two international carriers for review. Contributions were made to the review of the International Civil Aviation Policy.

During the year, assistance was provided to livestock shippers in an attempt to resolve problems in shipping livestock by air. Trade by air statistics were developed and new business opportunities for Canadian carriers were identified.

Traffic Services

Canadian manufacturers and government departments were advised on the shipment of a wide range of commodities to domestic and international markets. Information was provided on the availability of highway, rail and ocean transport services, transport routings and distribution cost factors.

Transportation costs and services from points in Canada to Europe, the U.S. and South America were analyzed to assist lumber shippers and other manufacturers to assess export markets.

The branch helped form Canadian acts covering the transportation of

dangerous goods and the implementation of the Container Safety Convention. It is also involved in the current assessment of whether Canada should become a party to the Multimodal Transport Convention. Other transport policy issues included Canadian and U.S. implementation of the GATT customs valuation code and Crow's Nest rates.

The branch promoted distribution productivity through its work on the Economic Commission for Europe's (ECE) Automation of Trade Documentation, and was responsible for establishing an industry consensus on a pallet size standard to simplify Canada's physical distribution system and transport packaging.

COSTPRO

The Canadian Organization for the Simplification of Trade Procedures (Costpro) is a non-profit corporation which endeavours to facilitate trade through simplifying procedures and documentation. The Costpro Secretariat is a division of the Transportation Services Branch.

During the year, Costpro:

- produced voluntary standards for devices to perform documentation electronically and to communicate trade data electronically;
- developed a standard plastic overlay technique which will make the Canadian Trade Document Alignment System available to businesses of all sizes at a low cost;
- presented briefs for regulator reform, the simplification of import procedures, trade facilitation at the ECE meetings and a study of administrative barriers on transportation;
- provided special services to its members to help them develop their trade documentation systems.

Machinery

The Machinery Program, designed to promote growth and productivity improvement in the machinery industry, continued to be a major activity for the branch. The program, while providing tariff protection to manufacturers and encouraging increased Canadian machinery production, allows duty remissions to machinery users in various industries on imported capital equipment not available from Canadian production.

During the year, the program received 36,000 applications covering \$4.3 billion in imports. Remission of duty was granted on equipment not available from Canadian producers, resulting in savings of \$325 million for Canadian industry.

Assistance pertaining to new manufacturing capabilities, installations of integrated production lines and automotive export orders contributed to additional Canadian production of \$1 billion and an estimated 14,300 jobs.

The program assisted 39 companies to begin production on 32 new products to replace imports. This represents \$110 million in production and close to 1,100 new jobs. New equipment includes industrial cleaning machines, metalworking machines, pulp and paper processing machines and food processing equipment.

The branch maintained detailed information on the production capabilities of more than 1,800 Canadian machinery producers to ensure that they were afforded the duty protection provided.

During the year, branch activities included:

- assessment of 15 new projects under the Enterprise Development Program (EDP) and 19 new proposals for R & D under the Unsolicited Proposals of the DSS Procurement System;

- initial review of 78 new enquiries under departmental programs and assistance to regional offices on more than 60 EDP projects;

- advisory services to the Inter-departmental Committee on the Defence Industry Productivity Program (DIPP) and the Shipbuilding Industry Performance Improvement Assistance Program (SIPIAP) involving the technical assessment of 100 projects;

During the year, the branch undertook a variety of industrial development initiatives aimed at increasing the range and volume of machinery manufactured in Canada. These included:

- approval and implementation of a duty remission program for front end wheel loaders resulting in a projected \$160 million increase in production. Direct new employment is projected at 800, with new employment in auxiliary manufacturing industries expected to be 400.

- assistance for the establishment of licensing agreements with foreign manufacturers of products such as heat treatment furnaces, turbo drills, stick delimbers, injection moulding machines, thermal drive boilers and pump jacks.

- involvement in activities relating to the design and manufacture of pulp and paper equipment, power generation equipment, environmental equipment and pumps.

- continuing assistance to the automotive industry on Canadian sourcing capability resulting in the installation of \$75 to \$100 million in Canadian equipment.

- initiatives toward rationalization and specialization arrangements for the production of gas turbines, grinding mills, compactors, industrial drills, vault security systems, batch washers, hardware and oil field treatment equipment.

- assessments of production opportunities on such products as brake lathes, tire changers, seed spreaders, heating equipment and plumbing equipment.

Canadian machinery continued to achieve major gains in the export market and to demonstrate significant potential for future export sales. The highlights of the branch's efforts in export development during the year included:

- approval of 72 applications under the Program for Export Market Development (PEMD), with potential business estimated at \$600 million;

- participation in eight international trade fairs and organization of nine trade missions. Potential sales from these activities amount to more than \$350 million.

Technology

During the year, grants were awarded to eight Industrial Research Institutes (IRI) and Centres of Advanced Technology (CAT) to encourage these organizations to undertake research and development projects and provide technological services to industry. Seven IRI's and three CAT's established under the program are now self-sustaining.

Agreements were signed with the University of Waterloo and with É-

cole Polytechnique de Montréal to provide funds for the establishment and operation of Industrial Innovation Centres. The Centres will evaluate inventions, assist in the development and commercialization of new products and in the establishment of new technology-based companies.

Two industrial Research Associations (IRA) -- the Sulphur Development Institute of Canada and the Centre for Research and Development in Masonry -- continued to receive support. Two other organizations -- the Canadian Gas Research Institute and the Welding Institute of Canada -- are now financially self-sustaining on industrial contract income.

Assistance continued for four Centres of International Business Studies at Canadian universities and the Management Advisory Institutes at the University of Alberta and Laval University. Negotiations continued with the three Prairie provinces to establish a Centre for International Business Studies in that region.

Ten awards were made under the Technological Innovation Studies Program during the year: nine to universities and one to an independent researcher. More than 4,000 copies of reports published under this program were distributed. They covered such subjects as the international transfer of technology to Canada and the employment implications of the introduction of Computer Aided Design and Computer Aided Manufacturing (CAD/CAM) systems.

Work was completed on consolidation into one program of various assistance programs administered by the department. It will be called the Institutional Assistance Program.

An active program was maintained during the year to increase the use of CAD/CAM in Canadian industry. The CAD/CAM Technology Advancement Council, formed by the department in 1978, issued a major report on the subject entitled "Strategy for Survival". Some 1,300 copies of this report were distributed across Canada. Intra and interdepartmental committees were established to review the report and to develop recommendations for further government action to promote the adoption of this technology.

Increased attention was devoted to creating an awareness of national and international activities and developments in the area of biotechnology and genetic engineering. Arrangements were made for visits by a West German delegation to Canadian companies involved in this technology, and meetings were held to discuss possible Canada/Federal Republic of Germany cooperative technology development projects under the framework of the existing Science and Technology Exchange Agreement.

Contributions were made to the development of a five-year Space Program for Canada and the completion of a Space Marketing Study. A briefing on Canada's Space Program was provided for industry in December, 1980, and monitoring of activities under the Canada/European Space Agency Cooperative Agreement continued.

Work to enlarge and expand the scope of the Industrial Energy Research and Development Program (IERD) was initiated and will be completed early in the new year.

Work continued on the implementation of the GATT Agreement on Technical Barriers to Trade, which Canada signed in 1979. A draft directive was prepared outlining procedures and practices to be followed by federal departments and agen-

cies in preparing, adopting or applying technical regulations, standards and certification systems.

A contract was entered into with the Standards Council of Canada for the establishment and operation of an enquiry point to provide information on Canadian standards, technical regulations and certification systems.

Resource Industries

Iron & Steel

The department continued active consultations with the Canadian steel industry through the Steel Industry Advisory Committee (SIAC). Industrial and trade promotion activities were carried out in cooperation with member firms of the Canadian Institute of Steel Construction (CISC), the Canadian Sheet Steel Building Institute (CSSBI) and the Canadian Steel Industry Research Association (CSIRA).

Assistance was provided to a wide variety of companies under various programs designed to assist industry, including PEMD, EDP and RDIA. Particular attention was devoted to trade opportunities arising from the Canadian structural steel fact finding mission to Venezuela, Trinidad, Tobago, Puerto Rico and Mexico organized by the division in the spring of 1980.

A report on "Fabricated Structural Steel and Steel Buildings from Canada" was published and circulated.

Consultations were held with U.S. officials concerning problems of mutual concern in the steel industry. Consultations were also held with member governments of the OECD Steel Committee in Paris, France, and the ECE Steel Committee in Geneva, Switzerland. The division hosted a three-week mission from

of Metallurgical Industries of the People's Republic of China on open pit mine slope stability technology. This mission visited iron ore and asbestos mines in Québec and Labrador.

Industrial Minerals

Assisted by the market development efforts of the division, the coal industry continued its strong export growth in 1980, with exports reaching \$793 million.

In 1980-81, contracts valued at \$11.5 billion were signed with Japan for coal delivery over a period of 15 years.

Coal export development efforts were sustained through incoming missions from the EEC, the U.K., Italy, Spain and the Philippines. In cooperation with the federal departments of Regional Economic Expansion (DREE) and Energy, Mines and Resources (EMR) -- as well as the provincial governments of British Columbia, Alberta and Nova Scotia -- a survey was conducted of the thermal coal markets in 18 countries. Continuing liaison was maintained with coal mining companies, provincial governments, Canadian embassies, and federal departments on current sales prospects for coal. Consultations were held with federal departments on proposals for federal expenditures in connection with the north-east British Columbia coal field and Cape Breton coal field developments.

The division continued to deal with the interests of Canada's asbestos mining industry in the context of regulatory actions being proposed by other countries. Interdepartmental federal/provincial meetings were held to develop a regulatory stance that is compatible both with governmental responsibility to protect public health and with the re-

sponsibility to establish an environment within which private industry can advance the Ministry the general standard of living. Discussions were also held with officials of the European Communities, the U.S., the Federal Republic of Germany, Sweden and Denmark. Preparations were begun for a world symposium on asbestos and health, to be held in Montreal in May, 1982.

The division promoted the formation of an industry association, formed in November, 1980, to represent Canadian producers of grinding wheels. The association and the division have since undertaken industry/government liaison tasks of mutual interest.

Metal Fabricating Industries

The department, in cooperation with the Commission of the European Communities, organized a mission to Europe to examine and evaluate the latest technology for copper processing. Papers were presented at a technical seminar by Canadian and European industrialists on technological advances in continuous casting and rolling of copper. Some members of the delegation visited plants in Belgium, France, the Federal Republic of Germany and the U.K. after the seminar. Others examined advanced technology processes in Finland and Switzerland.

The division organized an incoming mission of buyers from Norway and Sweden which met with six investment casting producers in Ontario and Québec.

During the year, the division initiated export market surveys for the export of wire, propane cylinders, steel door frames, electroplating supplies, copper alloy tubing and wrought copper and brass pipe fittings.

Non-Ferrous Metals

A technical mission of 15 representatives of the Canadian mining industry and the federal government visited Japan in March, 1981. The program, arranged in conjunction with the Japanese Mining Industry Association, included plant visits and formal meetings with Japanese government agencies and industry associations.

The mission investigated areas for technical exchange on smelting and refining processes of sulphide ores. A number of commercial trade opportunities identified by Canadian companies are being pursued.

The division arranged a visit by 12 Yugoslavian mining engineers and geologists to study uranium mining and related technology. Highlights of the visit included attendance at the Canadian Institute of Mining and Metallurgy annual meeting in Toronto, and visits to Ontario Hydro's Pickering nuclear-power plant, CANMET's research facilities and the Geological Survey of Canada in Ottawa, the Saskatchewan Mining Development Corporation, Eldorado's mine at Uranium City and Rio Algom's Quirke mine at Elliot Lake. In addition, visits were made to the Mineral Resources Group of the Ontario Ministry of Natural Resources and exploration and mining equipment firms in Toronto and Sudbury.

A Canadian delegation led by the division attended meetings of the International Lead and Zinc Study Group to discuss the world-wide market situation for these metals.

Metals & Minerals Policy

During the year, the division launched the metals and minerals sector policy review and implemented a detailed work program which included economic, trade and commodity analyses and consultation.

A project analysis was undertaken to assess the incidence of taxation on the rate of return, and an input-output impact study of the various metals and minerals industries was initiated.

The division is involved in the coordination of the Metals and Minerals Group industrial cooperation activities in the European Communities, France, Sweden, Japan and Australia. The division was active in the establishment of a Resource Processing Working Group with Japan.

The Federal/Provincial Working Group on Asbestos, with secretariat support from the division, has been developing a Canadian position paper on the regulation of asbestos.

Primary Wood Products

The third phase of the Cooperative Overseas Market Development Program (COMDP) was launched for a further five year period to December, 1985. The program, funded by ITC, the B.C. government and the Council of Forest Industries of British Columbia (COFI), is directed toward expansion of offshore markets for Canadian softwood lumber, plywood, shingles and shakes. The division administers the program jointly with the other two participants. Overseas exports from Canada increased from \$245 million in 1970, prior to the first phase of the program, to \$1.4 billion in 1980.

In 1980, domestic and U.S. markets for wood products softened considerably due to reduced housing construction. Consequently, the division placed greater emphasis on development of overseas markets for lumber, plywood and other primary wood products. Overseas exports from both Eastern and Western Canada increased by more than 20 per cent compared to 1979.

The division coordinated the Canadian response to the recent regulation of the EEC which requires that each shipment of softwood lumber to the EEC be accompanied by a phytosanitary certificate from Agriculture Canada certifying the absence of bark beetles. As this would necessitate in excess of 30,000 detailed inspections per year and could result in significant problems in supplying European markets, the division liaised with nine industry associations as well as with other governments concerned. In addition, a meeting was organized between EEC and Canadian government officials and industry representatives resulting in a compromise and a moratorium. This allows private sector mill inspectors to certify that a particular shipment has been produced from debarked logs and conforms to the plant health requirements of the importing country. It is anticipated that a permanent solution based on this industry-supervised program will be found shortly.

Presentations were made in five American cities and Québec City as part of the continuing export development efforts on behalf of the Canadian lumber and waferboard industry. The division organized and directed a mission of lumber importers from the Federal Republic of Germany which investigated Canadian production and exporting capabilities with a view to increasing lumber imports from Canada.

The division made special presentations at the ECE Timber Committee annual meeting, the ECE Symposium on Panel Products and other international conferences. The division also supported economic or industrial cooperation committees with Japan, Cuba, Algeria and Norway.

Pulp and Paper

The Pulp and Paper Modernization

Program announced in February 1979, progressed during 1980-81. The program enhances socio-economic benefits through increased investment in such projects as pollution abatement and energy conservation. To date, \$248 million of assistance has been offered toward specific projects, creating expenditures of some \$2 billion by the industry. Cost-sharing agreements have been signed with Québec, Ontario and New Brunswick. Nova Scotia and Newfoundland are expected to sign agreements shortly, whereas the western provinces have opted out of the program.

The division continued promotion of industrial cooperation through international committees. These included the Canada/EEC Industrial Cooperation Forest Products Working Group, the Canada/Japan Joint Economic Committee, the Canada/U.S.S.R. Working Group on Forest Based Industries, the Harmonized System Committee of the Customs Cooperation Council, the Canada/Cuba Joint Committee and the OECD Working Party on Pulp and Paper.

Manufactured Wood Products

Depressed potential in the domestic market caused by low population growth, changing family formation and high interest rates coupled with strong growth in international markets has made trade development the major activity of the Manufactured Wood Products Division. The division participated in numerous trade missions and shows, as well as market area studies and reconnaissance.

Exports totalled \$400 million in 1980-81, compared to \$175 million in 1975. While the U.S. continues to be the dominant export market, the major growth was in Western Europe, Japan and the Middle East.

During the year, worldwide concerns with energy conservation continued to generate interest in the Canadian timber-frame construction technique and related wood products. Numerous delegations, notably from Italy, the Federal Republic of Germany, the Netherlands and Japan, came to Canada to study the system and product supply.

Grain Marketing Office

Exports of the major grains, oilseeds and products were valued at 5.6 billion in 1980 as compared with just over \$4 billion in 1979. Exports of major cereal grains and products in 1980 were: wheat, 6.76 million tonnes (\$3.8 billion); barley, 2.7 million tonnes (\$404 million); oats, 219 thousand tonnes (\$25 million); rye, 453 thousand tonnes (\$87 million); corn, 749 thousand tonnes (\$129 million); wheat flour, 432 thousand tonnes (\$160 million); and the major oilseeds, 2.02 million tonnes (\$613 million). The office contributed to this increased export activity through credit grain sales guaranteed by the Government. These include approximately one-third of total wheat sales and some quantities of barley and oats.

The office also sponsored four incoming missions and eight technical seminars in established and potential import countries. A major world malting barley and malt market survey was completed and a report distributed to the industry.

The Canadian Wheat Board reached long term supply agreements with Mexico, Ghana and Lebanon during the year. A one-year agreement for supply of wheat and barley to Japan has also concluded.

In the oilseed sector, Canola processing capacity is continuing to

increase through expansion of existing facilities. The construction of a new crushing plant in Manitoba with a rated capacity of 600 tonnes per day was initiated. Oilseed crushing in 1980 totalled approximately 1.8 million tonnes.

Producer advance payments under the Prairie Grain Advance Payments Program declined 40 per cent to about \$60 million as a result of continued improvement in grain delivery opportunities. Interest costs, borne by the Government, totalled \$2.7 million, 42 per cent of the previous year's level.

On August 1, 1980, the domestic two-price wheat policy was changed to allow the domestic price to millers to fluctuate between \$5 and \$7 per bushel (\$183.72 and \$257.21 per tonne) in-store Thunder Bay.

POS Pilot Plant Corporation continued its developments in the food processing industry with \$640,000 in operating assistance from the department.

The Canadian International Grains Institute, jointly funded by ITC and the Canadian Wheat Board, expanded its international market development activities in 1980-81, and provided a variety of domestic programs for the Canadian industry. Thirteen courses were offered, including two international courses and four specially developed programs for customer countries.

The Grain Marketing Office sponsored incoming oilseed missions from Japan, Algeria and Hungary. Technical seminars on Canola were held in India, Pakistan, Bangladesh, Algeria, Morocco, Tunisia, Hungary, Czechoslovakia and the People's Republic of China. Exchanges of technical information and expertise

were conducted with India and annual consultations were held between industry and government representatives from Canada and Japan. As a result of the seminar program, a shipment of 1,000 tonnes of Canola oil was made to Pakistan for evaluation and Hungary purchased Canadian Canola meal for expanded feeding trials.

With PEMD assistance, a feasibility study of an export consortium of Canadian Canola crushers was initiated, and an export market investigation trip was undertaken by a Canadian maltster.

Design Canada/National Design Council

The National Design Council (NDC) met in three plenary sessions during 1980-81. In addition, a number of advisory committee and task force meetings took place. The council continued to promote good design in the products of Canadian industries, with particular emphasis on establishing effective communications with industry, associations, governments, educational institutions and the public.

The annual presentation of "Design Awards" to companies and individuals that have successfully used design as a practical, effective and profitable marketing tool were made in Toronto.

The Olivetti Design Process Exhibit, co-sponsored by Carleton University, Design Canada/the National Design Council and Olivetti Canada Ltd., was held in Ottawa, October 1-6, 1980. The council presented an exhibit at Batimat, an international fair at the Olympic Stadium in Montreal, March 23-28, 1981.

A Federal/Provincial Design Advisory Council was established as a forum for discussion and coopera-

tion in design promotion activities and the development of an overall Canadian design strategy. All 10 provinces are participating.

A public relations concept was developed to ensure maximum benefit from all design promotional programs and events. It will be implemented in 1981-82.

Professional Development

A total of 14 Design Canada scholarships were awarded in 1980-81: seven for studies in industrial design, six for studies in graphic design and one in textile design.

During the Ottawa Design Week, a seminar entitled "Design and the International Marketplace" was held for students of industrial design. It was sponsored by Design Canada, Olivetti Canada Ltd. and the Association of Industrial Designers.

The North American Design Conference was held in Toronto March 6-7, 1981. It was co-sponsored by the International Council of Societies of Industrial Design (ICSID), the Industrial Design Society of America (IDSA) and the National Design Council, and will form the basis for a joint NDC/ICSID publication to be presented at the ICSID Conference in Helsinki in August, 1981.

Design Programs

The Product Development Management Program (PDMP), a cost-sharing federal/provincial assistance program operated in nine provinces on a one-year basis. The program assisted a total of 173 firms to apply the total product design process.

Several seminar/workshops were held in various locations to promote design application in the products of specific industry sectors. An ex-

ample was the seminar for high technology electronics firms held in Ottawa, April 10, 1980.

In addition, successful seminars on "Design in Packaging" were held in Winnipeg, Vancouver and Halifax. The main beneficiary was small industry, particularly processed food packers.

Seminars on "Design as an Integral Element of the Hospitality/Tourism Marketing Process" were held in Halifax and Toronto in March, 1981. They were co-sponsored by the Canadian Government Office of Tourism (CGOT) and Design Canada, with the target audiences being the owner/operators of private motels and hotels.

Design Canada provided advisory and counselling services to small and medium size Canadian companies. In addition, evaluation and advisory assistance was provided on design components of companies' submissions for assistance under the Enterprise Development Program (EDP).

TOURISM

International receipts made tourism one of Canada's top six earners of foreign exchange during 1980-81. Canada attracted a significant share of world travellers although global inflation, recession and high energy costs dampened world-wide tourism. The exchange rate of the Canadian dollar in relation to world currencies was a positive factor for Canada's tourism industry.

Tourism revenues for Canada in 1980 were estimated at \$12.8 billion, compared to \$12.3 billion in 1979. About \$9.5 billion was spent by Canadians in 1980, a slight increase from \$9.4 billion in 1979. More than 38 million American visitors spent \$2.1 billion, the first time U.S. revenues have exceeded the \$2 billion level. In 1979, there were 31 million U.S. visitors for total revenues of \$1.8 billion. An estimated 2.2 million overseas visitors spent \$1.2 billion in 1980, compared to two million overseas visitors with revenues of \$1 billion in 1979. The travel deficit increased

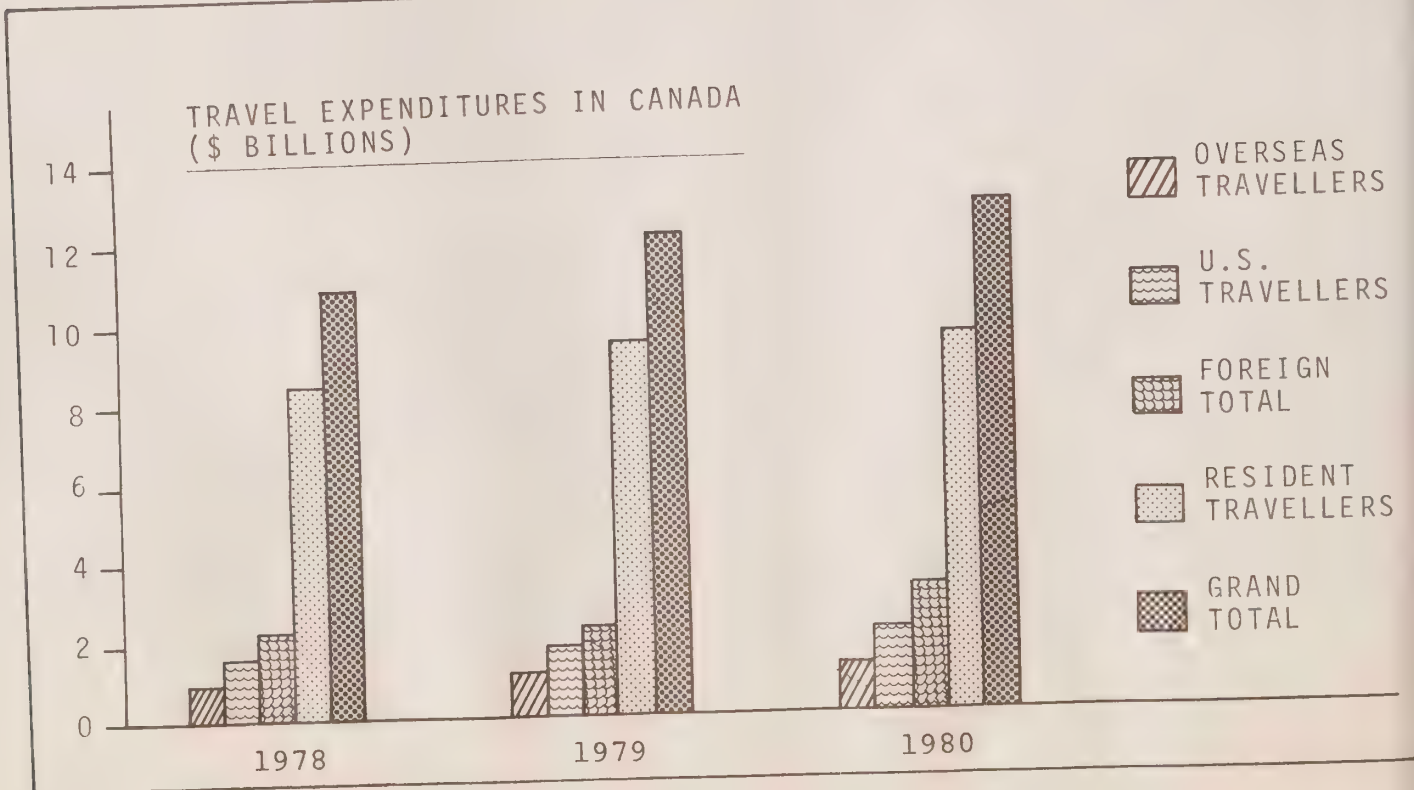
to \$1.138 billion in 1980 from \$1.068 billion in 1979.

Tourism Marketing

The Canadian Government Office of Tourism (CGOT) operated 27 market development and promotional offices in 1980-81: six in Canada, 14 in the United States and one in each of Britain, France, the Federal Republic of Germany, the Netherlands, Mexico, Australia and Japan.

Vacation Canada advertisements were placed in periodicals which reached almost 70 per cent of all Canadians. A campaign in ethnic publications invited new Canadians to see Canada and encouraged their friends and relatives to visit here as well.

An estimated \$50 million of business was transacted at the fourth annual Rendez-vous Canada in Winnipeg, May 18-22, 1981, an increase of \$13 million from 1979. This international marketplace attracted 274 selling organizations and 19 buying organizations, a dramatic increase from 1979 figures of 13 and 154 respectively.



The "Canada: So Much To Go For" program, which encourages Canadians to travel within Canada, offered 62 competitively-priced package tours in 1980. Partners with CGOT in this venture are Air Canada, CP Air, VIA Rail, Pacific Western Airlines, Nordair and Voyageur. In 1981, the number of tours offered was increased to 120.

CGOT adopted a new strategy in the United States to deal with problems associated with energy and inflation. Major initiatives included:

- participation in a consortium of major transportation companies and motorcoach associations to produce a motorcoach awareness education program for travel agents;

- 65 market presentations in 31 American cities to bring together 21,000 people who influence travel and more than 600 suppliers of travel products;

- a direct marketing program which helped to encourage 26,000 travel agents and executives to sell vacations in Canada and motivate an estimated eight million prime travel prospects in the U.S. to vacation in Canada;

- development of two television specials, in cooperation with U.S. television production houses, which will be seen by an estimated 50 million viewers in the U.S.;

- coordinating and monitoring the tourism component of the McDonnell Douglas Aircraft Corp. industrial benefits program, which could mean 290 million in tourism revenues over the next 13 years in return for Canada's purchase of 137 new fighter aircraft, the CF-18 Hornet;

- major advertising campaigns in the U.S. promoting spring/summer and fall/winter vacations, including distribution of the travel sup-

plement "Travel Times" to 2.5 million households in 23 major American cities;

- initiation of a long-term marketing program, in cooperation with Delta Airlines and major travel wholesalers, to promote 14 comprehensive Canadian package tours through all the airline's regional sales outlets in the U.S.

CGOT placed advertisements in major publications in the United Kingdom, France, the Netherlands, Japan, Australia, the Federal Republic of Germany and Mexico. This included an insert in The Observer, which has a circulation of more than one million, and, in cooperation with CP Air, an extensive TV campaign in Japan. Co-advertisements were placed with major industry partners in Australia, Mexico, the Federal Republic of Germany and the Netherlands.

The "Welcome to Canada" program was introduced at 120 land border crossing points between Canada and the U.S.

CGOT sponsored the pre-game and half-time Grey Cup shows and a public service campaign with the Tourism Industry Association of Canada (TIAC).

CGOT also:

- undertook initial fact finding and promotional work in Latin America, Southeast Asia and Spain;

- distributed more than eight million pieces of promotional literature and materials;

- sponsored more than 100 promotional seminars in Canada, the U.S. and overseas;

- provided some 400 media representatives with Canadian tours;

- prepared 100 travel features for publication in Canada and the U.S.;
- produced 18 consumer and trade publications in as many as 10 languages.

Tourism Development

Approximately \$250 million were allotted to tourism development subsidiary agreements across Canada at the end of the fiscal year, which are to be spent over the lifetime of the sub-agreements, averaging three to four years.

A total of \$62 million in capital assistance was granted under a new initiative to Vancouver, Toronto, Montreal, Windsor, Hamilton, Charlottetown and Halifax for the construction of convention and trade centres.

During the year, CGOT began an inventory of the country's tourism facilities and published two new industry manuals: "Campgrounds in the '80s" and a directory of courses in the tourism/hospitality and recreation industry.

The Tourism Development Branch helped persuade the Bureau International du Tourisme Social to hold its first North American congress in Canada.

Regional development offices were opened in Edmonton, Québec City and Toronto.

CGOT provided logistics support and a display space to the Canadian culinary team at the World Culinary Olympics in the Federal Republic of Germany. The Canadian team placed third.

Policy, Planning and Coordination

The Research and Analysis Division of Policy, Planning and Coordina-

tion did four quarterly Canadian Travel Surveys covering all of 1980. Market intelligence presentations were made to the trade and partners in five European cities and 18 Canadian centres.

The division studied Japanese attitudes toward Canada as a travel destination, and conducted market probes in Australia and Switzerland.

Work started on a revision of CGOT's Tourism Forecasting Model and the conversion of CGOT's package tour inventory from a manual to an automated system.

The Policy Formulation Division completed the Tourism Sector Strategy for presentation to Cabinet.

The division also prepared a report on the impact of energy on tourism to 1985, and developed broad responses to energy scenarios. CGO participated in the work of a Joint Federal-Provincial Energy/Tourism Task Force.

In addition, the division undertook analyses of the European Communications Tracking Studies in order to use the results more effectively in marketing communications. The studies were originally undertaken by the Research Division to identify the needs and desires of European travellers. The division also analyzed the U.S. travel market and its nine major regions.

In January, 1981, the regional policy representative in Atlantic Canada was handed responsibility for all operations of the federal Tourism Program in that region.

The branch's Coordination Secretariat provided logistic and secretariat support to the 1980 Conference of Canadian Tourism Officials, the 1980 Federal/Provincial Conference

of Tourism Ministers and the Government/TIAC Advisory Committee. The secretariat also prepared material for CGOT participation in the World Tourism Conference in Manila and the OECD Tourism Committee meetings in Paris.

PERSONNEL

A new program of succession/career planning was instituted at the senior executive level.

More effective control of the appraisal process was achieved by increasing manager's level of accountability.

The Senior Management Committee approved recommendations which advance the Official Languages Program by emphasizing Francophone participation, the development of bilingual units, bilingual telephone answering service and the upgrading of linguistic proficiency levels.

The Classification Division coordinated conversion programs, including two which involved more than 200 positions in the Senior Management category, and one involving 60 positions in the Economics, Statistics and Sociology group.

Identification of training and development needs was integrated with the personnel management planning process.

ECONOMIC POLICY AND ANALYSIS

Economic Policy and Analysis provided economic intelligence, research, analysis, policy planning and coordination to the department.

The Trade and Structural Analysis Branch assembled international trade data from its U.N. Trade Data Bank and economic simulations from the ITC Canadian Explor Model (CEM). The branch did analytical projects in international economics, commercial policy, industrial development and adjustment. This work was particularly important in the development of an Industry and Labour Adjustment Program.

The Microeconomic Analysis Branch studied high technology financing, declining sectors, foreign ownership guidelines and performance assessment, industrial adjustment and the economic costs and benefits of trade protection. It also studied the role of multinational enterprises in Canadian industrial development. The branch did its semi-annual survey of business investment and its annual survey of foreign owned subsidiaries. Several reports resulting from the business investment survey were published.

The Economic Intelligence Branch provided information on current and short term economic conditions in Canada and abroad. The branch published periodical studies on Canadian trade performance and competitive position.

A Special Projects Branch is being formed as a centre of departmental expertise on cost-benefit and project analysis.

OFFICE OF REGIONAL AFFAIRS

During 1980-81, the department created an Office of Regional Affairs. The office will co-ordinate the regional dimensions of departmental activities. It will also be a focal point for departmental interface with the provinces and with federal departments and agencies concerned with regional economic development and industrial diversification.

METRIC COMMISSION CANADA

The implementation of Canada's metric conversion program was 56 per cent complete at the end of the fiscal year. The planning and scheduling of more than 96 sectors is complete and implementation is well advanced. A total of 37 sectors have completed 75 per cent or more of their planned activities.

Metric Commission Canada now has held 60 meetings since the program began in 1972. The Interdepartmental Committee for Metric Conversion, which coordinates federal government conversion activities, has met 20 times.

The provinces and territories are carrying out their own conversion programs through legislation and regulatory action. Information centres are operating in nine of the twelve provincial and territorial capitals on a cost-sharing basis. The Intergovernmental Metric Conversion Committee has met 24 times.

INDUSTRY, TRADE AND COMMERCE
Statement of Expenditures for the Fiscal Year 1980-81

Trade Industrial Program

Operating Expenditures		
- Salary and superannuation	86,688	
- Other	<u>51,475</u>	138,16
Grants and Contributions		
- Enterprise Development Program	55,002	
- Defence Industry Productivity Program	94,932	
- Program for Export Market Development	11,402*	
- Capital subsidies for the construction of commercial and fishing vessels	71,736	
- Metric Conversion	2,824	
- Trade and Convention Centres	9,276	
- Small Business Loans - Losses	5,058	
- Payment of EDP Insurance Losses	8,402	
- Payment of EDC Insurance Losses	2,779	
- Payments for construction of dry docks	22,214	
- Miscellaneous	<u>4,386</u>	288,01
Loans and Investments		
- Loans to deHavilland Aircraft	1,660	
- Loans to assist Defence Manufacturers with defence plant modernization	21,467	
- Loans to Canadair for the financing of water bombers	<u>14</u>	23,14
		<u>449,31</u>

Tourism Program

Operating Expenditures		
- Salary and superannuation	8,911	
- Other	<u>21,066</u>	29,9
Grants and Contributions		
- Miscellaneous		<u>1,6</u>
		<u>31,5</u>

* Includes: PEMD, \$9,044,029; Carnets, \$24,833; U.K. Chamber of Commerce \$6,000; Agriculture and Grain Marketing Assistance Program (AGMAP), \$498,994; Fisheries, \$200,000; B.C. Forest \$,628,279.

INDUSTRY, TRADE AND COMMERCE

Statement of Expenditures for the Fiscal Year 1980-81 (con't.)

<u>Grains Program</u>		\$ (000)
Operating Expenditures		
- Salary and superannuation	1,323	
- Other	<u>686</u>	<u>2,009</u>
Grants and Contributions		
- Credit Wheat Sales	16,589	
- Payment to the Canadian Wheat Board to cover carrying charges on reserve stocks of feed grain	733	
- Prairie Grain Advance Payment Act	2,710	
- Western Grain Stabilization Program	119,416	
- Assistance to the Canadian rapeseed processing industry	3,000	
- Oats Pool Deficit	1,828	
- Miscellaneous	<u>3,270</u>	<u>147,546</u>
		<u>149,555</u>
Total Department		<u><u>630,460</u></u>

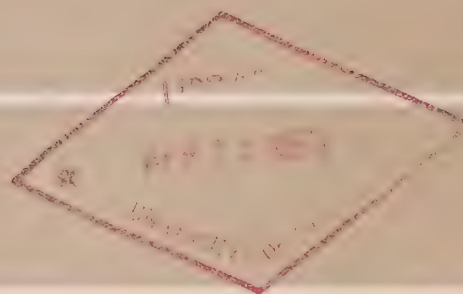
INDUSTRY, TRADE AND COMMERCE

Statement of Revenues
For the Year Ended March 31, 1981

	\$ (000)
Return on Investments	
Interest on loans to Export Development Corporation	101,045
Interest on loans to Federal Business Development Bank	94,504
Interest on loans to Canadian Commercial Corporation	556
Interest on loans to assist manufacturers of automotive products	186
Interest on loans to assist the pharmaceutical industry	17
Interest on loans to assist the footwear and tanning industries	20
Interest on loans under the Enterprise Development Program	742
Sundry	302
Miscellaneous Revenue	8,120
Refunds of Previous Year's Expenditures	9,759
Adjustment Prior Years Payables at Year End (PAYE)	2,515

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Industry, Trade and Commerce Annual Report 1981-1982



Industry, Trade
and Commerce

Annual

Report

1981-1982

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His Excellency
The Right Honourable Edward Schreyer, Q.C., C.M.M.
Governor General of Canada

Your Excellency:

I have the honour to submit to Your Excellency the annual report for the Department of Industry, Trade and Commerce covering the period April 1, 1981 to March 31, 1982.

Your Excellency, you will find in this report, under appropriate headings, a summary of the accomplishments of the department.

Respectfully submitted,

A handwritten signature in dark ink, appearing to read 'Ed Lumley', with a stylized flourish at the end.

Edward C. Lumley
Minister of Industry,
Trade and Commerce and
Regional Economic
Expansion

INTRODUCTION

This Annual Report of the Department of Industry, Trade and Commerce reports on continuing activities of the department during a year of transition.

On January 12, 1982, the Prime Minister announced a major reorganization of several federal departments. The reorganization was aimed at ensuring effective action in support of the government's priorities in the areas of regional and industrial development and trade and export promotion. It marked a major step toward implementing the strategies outlined in **Economic Development for Canada in the 1980s**, the federal document released with the November 1981 budget.

Following are the major changes involving ITC.

The industry, small business and tourism components of ITC and the regional programs of the Department of Regional Economic Expansion were merged into a single federal department. The merger, which began in spring 1982, will focus the government's industrial policies and programs in support of regional development strategies and ensure that the benefits of industrial activity are widely shared across the country.

The international trade elements of ITC were transferred to the Department of External Affairs, permitting that department to give greater priority to trade objectives in the

conduct of international relations and strengthening Canada's ability to adapt to changing world economic conditions.

- The Metric Commission was transferred from ITC to the Department of Consumer and Corporate Affairs, reflecting the progress of metric conversion beyond its initial focus on industry to areas in which the consumer is most directly affected.

A continual process of adaptation and growth has marked the history of the Department since its inception as the Department of Trade and Commerce in 1892. From a modest beginning, with nine employees and a yearly budget of \$15 000, the Department has expanded with the country and increased its responsibilities and services in line with economic needs. In 1969 it merged with the Department of Industry to form the Department of Industry, Trade and Commerce.

In 1982, the Annual Report of the Department of Industry, Trade and Commerce/Regional Economic Expansion will begin documenting the effects of the most recent changes. The integration of industrial and regional expertise provides a strong basis for more regionally responsive industrial policies and programs, more effective program delivery in all regions, and improved access to federal industrial development programs for businesses throughout Canada.

HIGHLIGHTS

The following is a brief summary of the activities of the Department of Industry, Trade and Commerce during the 1981-82 fiscal year.

- The integration of the Department of Industry, Trade and Commerce (ITC) and the Department of Regional and Economic Expansion (DREE) into a single federal department, with central headquarters in the C.D. Howe Building in Ottawa, was initiated.
- Nine communities in several regions of the country were designated as eligible for labour adjustment aid to alleviate unemployment. Forty private enterprises were assisted at a cost of \$22.6 million, providing employment for about 3 000 Canadians.
- Research progressed rapidly into the problems confronting the small business community. The Small Business Secretariat was involved in several national policies to improve prospects for the small business sector.
- Adjustment assistance loan guarantees valued at \$131.7 million were authorized. In addition, \$119.2 million in contributions was paid toward the cost of innovation and product development projects.
- As part of a new government policy, a \$267-million adjustment program was begun to foster the development of the clothing, textile, footwear and tanning industries and help offset low-cost competition. It provided for continued import restraints.
- Applications were received from 4 176 firms for assistance under the Program for Export Market Development (PEMD). Approximately \$31 million was approved and \$12.8 million allocated. Export sales as a result of the program amounted to \$300 million.
- A new \$25-million fund was created under the Industry-Specific Restructuring Program to assist adjustment in the auto parts sector.
- Financial assistance continued for the establishment of centres of advanced technology and other initiatives for the development of technological capability and productivity.
- A number of bilateral trade issues were resolved affecting access for Canadian agricultural exports into the European Economic Community (EEC) market.
- Consultations were initiated with the provincial and private industry on a policy framework for the development of the petrochemical industry. An interdepartmental task force was set up to study problems concerning petrochemical feedstocks.
- Tourism revenues for Canada were estimated at \$16.5 billion. Canadians accounted for about \$12.8 billion, visitors from the United States accounted for \$2.4 billion, and visitors from overseas accounted for \$1.3 billion. Canada's tourism deficit decreased by 5.7 percent from that of the previous 12 months.
- Trade between Canada and the United States reached a record \$107.8 billion. Canadian exports totalled \$53.7 billion and imports totalled \$54.1 billion.
- The European Economic Community absorbed \$8.7 billion of Canadian exports during the year. Exports to Eastern Europe increased by 10 percent over 1980-81 to reach \$2.4 billion.
- Trade between Canada and Japan reached \$8.5 billion, leaving Canada with a trade surplus of \$460 million, compared to \$1.6 billion 1980-81. Increased motor vehicle imports were greatly responsible for the decline.

Negotiations resulted in an announcement by Japan to limit passenger car exports to Canada for the 1981-82 fiscal year.

In January 1982, the Minister of State for Trade represented Canada in informal trade discussions with its major trading partners - the United States, the European Community and Japan.

Exports to Latin American countries totalled \$3.8 billion. Mexico, Brazil and Venezuela were the major customers. Fully manufactured goods made up 40 percent of these exports.

Receipts from exports of major grains, oilseeds and products totalled \$5.9 billion, accounting for 73 percent of Canadian agricultural exports.

Defence exports trade increased to \$1.350 billion and imports rose to \$1.139

billion. The majority of trade was with the United States.

- . The Trade Commissioner Service (TCS) operated a network of 92 offices in 68 countries, employing 230 trade commissioners and 170 locally-engaged commercial officers. The TCS was transferred to the Department of External Affairs in January 1982.
- . Expenditures on department-initiated trade fairs and trade missions totalled \$8.3 million. The programs assisted 900 companies to exhibit in trade fairs in 28 countries; 650 industry representatives were involved in 57 missions to 41 export countries; and 1 615 foreign business people from 66 different countries were brought to Canada.
- . The immediate sales that resulted from trade fairs and incoming and outgoing trade missions are expected to exceed \$350 million.

FINANCE

The group under the Assistant Deputy Minister, Finance manages the Department's finances and is responsible for the central administrative services of the Department. It also carries out some unique functions based on the Department's relationship with private industry in Canada, particularly in the areas of financial investment and loan support.

The major responsibilities of the Finance Group fall into three general areas:

- Overall departmental planning -- advice and control for resource planning, allocation and utilization; operational planning and budget control; financial, administrative and systems services; and the evaluation of program effectiveness.
- Financial management -- banking and investment activities on behalf of the Department covering central management and control; advice to senior management; participation on boards of directors of development banks, government agencies and designated companies; provision of financial investment analysis; and direction and control of significant funding programs of the Department.
- Assistance to private industry -- provision of policy advice and analysis over a wide range of private industry interests affecting the Department, including special responsibilities relative to small businesses in Canada.

These include the normal responsibilities of departmental financial officers for traditional budgeting and accounting services and special emphasis placed by senior management on the improvement of practices, processes and overall Department accountability.

PROGRAMS BRANCH

The Programs Branch is responsible for general management and control of the Department's major funded industrial programs, including loans, insured loans, grants and contributions. The branch also administers the Small Businesses Loan Act under which guaranteed loans are provided by designated private lenders to assist small

business enterprises. Financial assistance and support through loans, grants and guarantees provided by the Department continued to be an essential factor in the stimulation and trade development of manufacturing and service industries in Canada during 1981-82.

The branch undertook or participated in a number of activities designed to improve and expedite the delivery of assistance to industry. Discussions continued to be aimed at greater consolidation of existing programs. Considerable progress was made in the development of methods for ranking and setting priorities of major projects. The branch directed considerable effort to the development of an improved reporting system to attain better management of the program budgets.

Improved forecasting techniques were utilized, together with increased management control of program commitments on a multi-year basis. The delivery systems were streamlined to attain more efficient processing of project applications and prompter payment of claims.

Branch activities involve participation in enterprise development, defence industry productivity, export market development, industrial energy research and development, small business loans, productivity improvement and interfirm comparisons. Following is a brief summary of the activities and functions of these divisions.

Enterprise Development Program

The Enterprise Development Program (EDP) assists manufacturing and processing firms to improve their viability and international competitiveness. It provides support by sharing project costs or providing insurance on term loans on a last-resort basis. During 1981-82, 140 adjustment assistance loan guarantees, valued at \$131.7 million, were authorized (Table 1). It is estimated that this assistance will lead to the creation or maintenance of approximately 6 600 jobs during the next five years.

In addition, \$119.2 million in contributions were authorized towards the cost of 576 innovation and product development projects in such industries as machinery, electronics, ship components, automotive vehicles, building components and textiles (Table 2).

precasts for these projects indicate sales of \$1.7 billion during the next five years and creation and maintenance of 15 900 jobs.

Table 1

**Adjustment Assistance
Loan Guarantees
by region, 1981-82**

	Number of Projects	Amount (\$ millions)
Atlantic	14	2.5
Quebec	29	25.1
Ontario	66	99.3
Prairies	20	3.2
British Columbia	11	1.6
Total	140	131.7

Table 2

**Innovation Approvals Under the Enterprise
Development Program
by region, 1981-82**

	Number of Projects	Amount (\$ millions)
Atlantic	26	2.0
Quebec	306	35.3
Ontario	135	62.7
Prairies	75	14.5
British Columbia	34	4.7
Total	576	119.2

Defence Industry Productivity Program

The Defence Industry Productivity Program (DIPP) (Table 3) provides financial assistance to industrial firms involved in the production of defence or defence-related products for export, in order to develop and sustain the technological capability of the Canadian defence and related civilian industries. The program operates under international agreements for defence development and production sharing.

A total of 85 projects, generating sales of \$1.7 billion, were completed in 1981-82, and

189 new projects were contracted. Total program expenditures were \$154.9 million. Sixty-seven percent of the sales generated under the program were in the defence export market, and 33 percent were in related civilian exports.

Table 3

**Defence Industry
Productivity Expenditures
by region, 1981-82**

	Number of Projects	Amount (\$ thousands)
Nova Scotia	2	73.7
Quebec	69	93 588.3
Ontario	110	57 581.7
Manitoba	1	7.7
British Columbia	7	3 683.5
Total	189	154 934.960

Program for Export Market Development

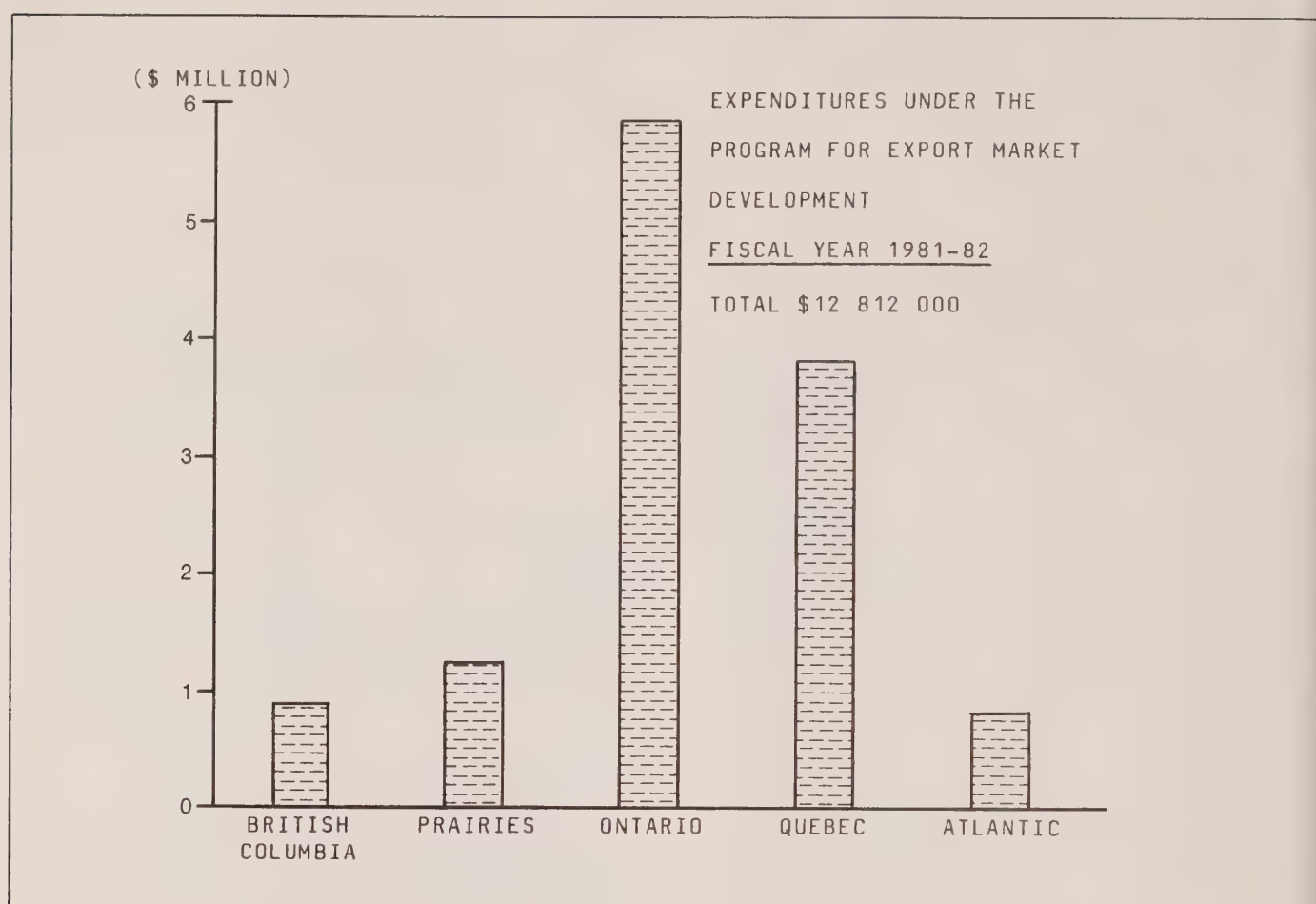
The Program for Export Market Development (PEMD) (see following chart) helps develop and increase the export of Canadian goods and services by sharing with the business community the financial risks of entering new foreign markets. The program's eight sections cover specific project bidding; market identification; participation in trade fairs; incoming buyers; formation of export consortia; sustained export market development; export markets for agriculture, fisheries and food products; and contributions to non-profit organizations.

During the year, 4 176 grant applications were received, approximately \$31 million was approved and \$12.8 million was allocated. This compares to 3 312 applications received, \$15.8 million approved and \$9 million allocated in 1980-81.

Companies reported export sales of \$300 million as a result of the program. A total of \$4.8 billion in exports has been generated with PEMD assistance since the program was started in 1971.

Industry Energy Research and Development Program

The Industry Energy Research and Development Program (IERD) encourages the development of new and improved processes and equipment to reduce energy consumption in industry.



A total of 26 projects requiring total funding of \$9 075 000 have been approved since IERD was established. Of this amount \$1 774 000 comprises actual expenditures to date and the remainder comprises commitments made for future years. In 1981-82, expenditures under the program were \$563 000.

Small Businesses Loans

The Small Businesses Loans Program (Table 4), established under the Small Businesses Loans Act, makes term loans available to small Canadian businesses for a wide variety of capital improvements. The loans, guaranteed by the federal government, bear maximum interest rates of bank prime plus one percent. The maximum term is ten years.

A total of 16 643 loans for \$491.9 million were made under the program in 1981-82, compared with 18 143 loans for \$470.7 million during 1980-81. Loss claims paid during the past year amounted to \$6.5 million, an increase of \$1.4 million over the previous year.

Table 4

Loans Under the Small Businesses Loans Act
by province and territory, 1981-1982

	Number of Loans	Amount (\$ millions)
Alberta	1 617	47.7
British Columbia	4 073	122.0
Manitoba	481	14.6
New Brunswick	337	9.4
Newfoundland	166	5.0
Nova Scotia	259	7.4
Ontario	3 256	105.0
Prince Edward Island	63	1.4
Quebec	5 379	147.9
Saskatchewan	953	29.2
Northwest Territories	9	.5
Yukon	50	1.8
Total	16 643	491.9

Productivity Improvement and Interfirm Comparisons

The Productivity Improvement Service, formed to assist Canadian industry in improving its competitiveness, undertook a variety of industry sector interfirm comparisons during the year, including chocolate confectionery, textile home furnishings, carpets, upholstered furniture, wood pallets, steel foundries, plastic film, shipbuilding and repair, sheet steel fabricators, bakeries, and mechanical contractors. More than 200 firms participated during the year. A total of about 1,000 firms in 55 sectors have benefitted from the program since its inception.

FINANCIAL SERVICES AND MANAGEMENT BRANCH

This branch is responsible for determining the level of long-term departmental resource requirements to be included in the strategic overview, essential in multi-year operational plans, and in estimates required through the Ministry of State for Economic Development (MSED) and the Treasury Board.

During the year the branch continued to expand its role of assisting senior management personnel of the Department to plan resource allocations and analyze regular reporting on departmental budgets and operations. The branch helped to develop and maintain departmental systems to support these activities and continued its responsibility for management in the implementation of Improvement Management Practice and Controls (IMPAC) and the development of Planned Measurement Service (PMS).

The branch provides administration and central computer control services for the Department. The Business Opportunities Sourcing System (BOSS), the Import Analysis System and the Access to Information Division also reported through the Branch as part of an overall program of internal and external data management.

Import Analysis Directorate

The Import Analysis Directorate continued to carry out import analyses based on access to detailed customs documents provided under special provisions of the Trade and Commerce Act. These analyses provide breakdowns by any specification important to production or marketing, such as type, process, function, size and price.

The reports enable business and government to identify specific development opportunities and are particularly useful to small and medium-sized enterprises which do not have their own market

research groups. Government departments use the data to help assess the effects of tariff policies and quotas, and to negotiate new trading arrangements and support for industrial development initiatives of the Department.

In the 1981 program of analysis, job creation by clients of the service amounted to 3,362, at a cost to the federal government of \$181 per job. Investment by clients was \$37 million.

Fast Response Market Service. The Fast Response Market Service (FRMS) is a market information service developed by Import Analysis Directorate (IAD) to help clients improve their decisions on financial assistance applications. It provides a choice of two kinds of market analysis of a client's product or service -- a fast, concise report (FRMS-2) or a detailed, comprehensive report (FRMS-22). The depth and turnaround period for FRMS reports are custom-tailored to the client's needs.

Business Opportunities Sourcing System

The Business Opportunities Sourcing System (BOSS) is a joint federal/provincial program which helps to identify Canadian companies as sources of supply. Canadian companies, governments and foreign organizations use the system to locate suppliers in Canada. For example, multinational firms committed to offsetting arrangements on Canadian government contracts can use BOSS to help purchase a wide variety of products. Users also find BOSS helpful in investigating new markets and producing specialized directories. Participation in BOSS is voluntary and without charge.

The provincial governments generally gather the information for BOSS and the federal government enters it and maintains the file. Information from the file is kept by the provincial governments, ITC headquarters in Ottawa, regional ITC offices across Canada and trade commissioner posts around the world. It is also widely distributed to the private sector.

During 1981-82, work continued on expanding the data base.

Computer Services

Innovations in a number of areas improved computer services of the department.

An Aerospace Offset Claims Monitoring System was developed to maintain claim data arising from major aerospace contracts. These industrial benefit or "offset" programs are recognized as an instrument of industrial development for export-oriented industries.

In support of the tourism program, a Package Tour Inventory System was developed which provides a profile of all package tours with a destination in Canada, and a new system was implemented to assist tourism marketing officers with information on meetings and incentive travel buyers.

To expedite the payments to suppliers of goods and services to the Department, the financial management system was modified to permit regional offices to issue cheques.

New computerized systems are being developed to improve the quality of information available in such areas as tourism, departmental incentives programs, financial management and industry sector analysis. These new systems will be in operation during 1982-83.

The Department spent \$5.7 million in 1981-82, up from \$4.2 million in 1980-81, to purchase data processing goods and services from the private sector. This is in line with the government policy of purchasing electronic data processing services from the private sector except where it is in the public interest or is economical to provide them internally.

Administration Services Branch

The Administration Services Branch undertook a program of modernizing its facilities in 1981-82 in order to serve the increased needs of the restructured department. Emphasis was placed on upgrading electronic information processing capabilities and introducing various technological and managerial improvements to achieve maximum efficiency throughout the Department.

"Low end" word processors were introduced throughout the Department as a first step in expanding the Department's capability to capture information electronically. In addition, an electronic message-routing system was installed and tested, an automated records management system was designed, and tests were carried out on a pilot project.

To provide greater convenience and efficiency of working space, a new modular office layout system was designed and a full-scale model was constructed to be used in future planning.

Briefing sessions were held concerning the Access to Information and Privacy Act, and work was completed on the departmental "registry".

The Administrative Services Branch also undertook physical integration of the departments of Industry, Trade and Commerce and Regional Economic Expansion, with central headquarters in the C.D.

Howe Building, 235 Queen Street, Ottawa, together with the integration of responsibilities and personnel of the two departments.

FINANCIAL POLICY AND LIAISON BRANCH

This branch coordinates policy and liaison with Crown corporations, agencies and financial institutions in the private sector, with particular reference to the Export Development Corporation (EDC) and the Federal Business Development Bank (FBDB), which report to Parliament through the Minister.

Continuing efforts were made during the year to negotiate lower levels of government subsidies for export financing under agreements sponsored by the Organization for Economic Cooperation and Development (OECD), in particular the Arrangement on Officially Supported Export Credits. As in the previous year, progress toward the agreement on raising interest rates has been disappointingly slow. However, the costs of subsidizing export financing on the scale undertaken by some governments are becoming increasingly burdensome and it is expected that this will be conducive to change being agreed to in the interest rate matrix later in 1982.

PROGRAM EVALUATION BRANCH

In 1978, the Department established a policy of including comprehensive program evaluations of all its activities at least once every three to five years. This practice continued in 1981-82. Evaluation studies were completed in two areas of departmental activity -- the Small Businesses Loans Act and the Trade Commissioner Service.

The Program Evaluation Branch was also involved in the preparation of evaluation plans and framework for a number of other departmental initiatives, including International Bureaus, Industry and Labour Adjustment Program (ILAP) and Duty Remissions.

SMALL BUSINESS SECRETARIAT

Due to the economic climate that prevailed during the 1981-82 period, the Department placed considerable emphasis on assistance to small business in Canada. A wide-ranging program, from seminars and symposiums to legislation and direct incentives, was undertaken by the Small Business Secretariat.

research on the small business community and the issues confronting it progressed substantially during the year. The Secretariat completed an update of the statistical profile of small business which included, for the first time, information on the export capabilities of small manufacturers and a review of unincorporated self-employed persons in Canada. To further facilitate the broad spectrum of research on small business issues, the Secretariat, in conjunction with the Institute for Research on Public Policy (IRPP), compiled a bibliography of work in this area in Canada. This is the first stage of what is expected to be a long and fruitful relationship between the Secretariat and IRPP in the area of small business.

The Minister of State for Small Business and Tourism was host at the Eighth International Symposium on Small Business in October 1981, attracting some 650 delegates from 66 countries. The theme of the event, which was organized by the Small Business Secretariat, was "Interaction". There were 64 presentations over the four-day period, including topics on the relationship between small business and associations, venture capital organizations, employees, financial institutions, large enterprises, educators, government and advisers. The keynote speaker was Alvin Toffler, author of *The Third Wave*, who discussed the revolution which has been created by modern information and communications technology.

In late 1981, an interdepartmental Committee on Small Business was formed, with meetings to be held bi-monthly. The primary objectives are information exchange and the coordination and intensifying of effort in the small business policy sphere. Representatives from sixteen federal departments or agencies are on the Committee.

The Minister of State for Small Business and Tourism and the Minister of State for Trade announced jointly in November that the Groupement Québécois d'Entreprises Inc. had received a grant to boost export activities among the 450 small to medium-sized manufacturers who are members of that association. Federal aid will help to meet salary and expenses of an experienced export adviser, operating costs, and expenditures associated with subcontracting, travel, accommodation and support staff.

Business Studies

In-house work continued on the rate of business formations and failures. Studies were completed on the circumstances surrounding business insolvency, including factors leading to bankruptcy and a comparison of the legislative framework

surrounding bankruptcy in Canada and the United States. The Secretariat published a working paper on the problems facing Canadian women owner/managers, based on a study contracted to Queen's University combining the most recent data from Statistics Canada with information derived from a special survey.

A major project launched during the year and scheduled for completion early in 1983-84 is an examination by the C.D. Howe Research Institute of the links between selected national policies and the behavior and development of smaller enterprises, together with a review of the implications for policy. The study makes use of work undertaken earlier in the year on the impact of changes in the economic environment on the performance of small firms. Another important study by a consulting group will examine the extent to which small businesses contribute indirectly to the value of Canadian exports through subcontracting and supplying components and services to large exporters.

Initiatives

The Small Business Secretariat was involved during the year in the development of several national policies to improve the economic climate and prospects of the small business sector. Initiatives announced in the November 1981 budget included: increases in the annual and accumulated income limits for the Small Business Tax Deduction to \$200 000 and \$1 000 000 respectively; and the extension to unincorporated businesses of the Small Business Bond measure for small companies in financial difficulty. The Secretariat has also been working with the Office of the Comptroller General and the Department of Supply and Services to improve government and supplier relations through the development of proposals to ensure prompt payment of government accounts.

Prior to December 1981, the Operations Directorate (formerly the Special Projects Group) was primarily concerned with staging the International Symposium on Small Business. Since that time a number of new initiatives have been launched to reorganize the group into a strategic planning and program development function.

In support of the strategic planning function, the Niagara Institute conducted a search conference for the Secretariat on the future of small business in Canada. The purpose of this conference was to obtain first-hand information from small business operators as to the sector's future during the 1980s, what difficulties they anticipated and what actions might be taken to remove these obstacles. The search conference report will serve as an important point of departure in

the development of a new small business strategy for Canada.

An important thrust in programming was the development of the Management Excellence in Small Business Program, which is designed to bridge the gap between small business and the academic community -- that is, between practice and theory. Under the program, the federal government will enter into agreements with business schools at universities and community colleges to develop practical course material; sponsor student work scholarships whereby business students can spend up to three months working in a small business; and conduct policy research related to small business.

Advocacy Office

The Advocacy Office within the Secretariat continued to be a focal point for "last resort appeals" and information requests from small business people. Officials responded to inquiries from many visitors -- including approximately 3 500 telephone calls, letters and ministerial correspondence. About 600 copies of the **Records Retention Requirements for Business** and numerous copies of other publications and brochures were distributed.

In addition to meetings with representatives of many business associations, the Advocacy Office maintained other links with universities and the international small business community. Meetings were held with visiting professors, foreign government officials, journalists and the Japan Federation of Small Business Associations.

INDUSTRY AND LABOUR ADJUSTMENT PROGRAM

Under a major program initiated by government in January 1981, nine communities in several regions of the country were designated during the past fiscal year as eligible for federal aid to alleviate unemployment. Recipients of offers under the Industry and Labour Adjustment Program (ILAP) included 40 companies and involved commitments expenditures totalling \$22.6 million. It is estimated that the projects will provide employment for 3 000 persons.

This \$350-million program is designed to reduce the distress in communities caused by permanent, large-scale industrial dislocations and associated layoffs of area workers.

The Community-Based Industrial Adjustment Program (CIAP) is a component of ILAP administered by the Department. Its major thrust is to encourage firms to undertake viable capital projects in designated Canadian communities affected by serious industrial dislocations. Decisions on assistance are made by the special Industry and Community Development Panel of the Enterprise Development Board.

The Industry-Specific Restructuring Program (ISRP) provides assistance to two industry sectors: major household appliances and automotive parts. Its principal aim is to encourage firms in the designated sectors, mainly small and medium-sized companies, to undertake viable projects.

TRADE COMMISSIONER SERVICE AND INTERNATIONAL MARKETING

INTERNATIONAL MARKETING POLICY GROUP

The functions performed by the International Marketing Policy Group (IMPG) will be shifted to the Department of External Affairs as part of the major reorganization.

These functions include:

- identification of international markets for goods and services produced in Canada;
- assistance to help Canadian industry develop and exploit these opportunities;
- negotiation of trade arrangements to give Canadian producers access to world markets;
- development of trade strategies to promote the growth and expansion of international trade; and
- maintenance of trade representation abroad to encourage and promote the sale of Canadian products and help keep the public sector up-to-date on export markets.

The Group reports to the Assistant Deputy Minister, Trade Commissioner Service and International Marketing. It serves as the Department's centre for the analysis, development and evaluation of policies and programs relating to export development and promotion. In performing this function, the group has produced a number of individual-country export development plans for high priority markets, drawing upon the expertise of the Department's industry sector branches as well as other federal departments, provincial governments and the private sector. Plans were completed in 1981-82 for Mexico, Australia, South Korea and Brazil. Several others, including Japan, Norway, West Germany and Saudi Arabia, are under way and will be published in the fall of 1982.

The Group is responsible for reviewing and participating in the improvement of Canada's export financing support facilities to prevent Canadian exporters from being placed at a competitive disadvantage. It ensures that departmental objectives and concerns are adequately addressed in both policy deliberations and operational aspects of the Export Development Corporation (EDC), Canadian International Development Agency

(CIDA), the Canadian Commercial Corporation, and in Canadian participation in projects financed by international institutions.

IMPG has coordinated both federal interdepartmental and federal-provincial international marketing initiatives, and has provided secretariat services to the Export Trade Development Board for seven meetings held this past year. These meetings have provided a useful exchange of views on a number of export subjects between government and Board members from the private sector, including both industry and labour.

Promotional Projects Program. Expenditures on departmentally-initiated trade fairs and trade mission projects funded through the Promotional Projects Program totalled \$8.3 million in 1981-82.

In promoting the sale of Canadian goods and services in international markets, the program helped 900 companies exhibit at 118 trade fairs in 28 countries; sent 650 industry representatives on 57 missions to 41 export markets; and brought 1 615 foreign businessmen from 66 countries to Canada. The immediate export sales influenced by these events are expected to exceed \$350 million.

BUREAU OF EUROPEAN AFFAIRS

Most European countries have been traditional customers of Canada for decades. Despite difficult circumstances in some areas, effective trade promotion was an important factor in maintaining trade levels in most regions. Some slippage was recorded in Western Europe, while Canadian exports to Eastern Europe increased despite a turbulent period.

Western Europe

The European Economic Community (EEC), the world's largest trading entity and Canada's second largest trading partner, absorbed \$8.7 billion of Canadian exports in 1981-82. Canadian exports to Western Europe fell by 9.5 percent to \$10 billion in 1981-82, while imports rose by 11.5 percent to \$7.8 billion. Britain continued to be Canada's largest European market, accounting for 33.2 percent of all exports to that region. Canadian trade with other Western European countries fell

to \$1.3 billion from \$1.6 billion in 1980-81. Imports maintained their previous year's level of \$1.5 billion.

The Department's initiatives toward development and maintenance of Canadian business links with the region concentrated in three broad areas: economic cooperation, market access and export promotion.

Economic cooperation activities continued under the Framework Agreement with the EEC. Working groups of business people and officials from Canada and the EEC explored possibilities for cooperation in specific industrial sectors, such as forest products, metals and minerals, energy conservation and urban transportation.

Industrial cooperation activities continued during the year under review, notably with Sweden. A comprehensive review of possible activities in this field was undertaken with Germany and a special mechanism was established to carry this work forward. Canada participated in 36 trade fairs in the area and 16 incoming and outgoing trade missions were arranged. This work represented some 38 percent of the department's total promotional projects budget.

Eastern Europe

Canada's trade relations with Eastern Europe in the past year took place in the context of deteriorating East-West relations which began with the invasion of Afghanistan by the Soviet Union in 1979 and continued with the imposition of martial law in Poland in December 1981 -- events which prompted the Western countries including Canada to adopt sanctions against the Soviet Union and Poland. However, Canadian exports to Eastern Europe in 1981-82 increased by 10 percent over 1980-81 to reach \$2.4 billion, and imports increased by 14 percent to \$350 million, giving Canada a \$2 billion trade surplus.

Canada's main clients in Eastern Europe were the USSR, Poland, Yugoslavia and Czechoslovakia. Eighty-seven percent of exports to Eastern Europe in 1981-82 were agricultural products, mostly grains. In addition, some 350 Canadian firms found markets in Eastern Europe for a wide variety of other products, such as pulp and paper, machinery and equipment, aircraft and parts, and metal-fabricated products. Work continued on major projects undertaken by Canadian firms in the past few years. A contract between Atomic Energy Canada Limited (AECL) and the Romanian Government covering the sale of two CANDU reactors took effect on December 29, 1981.

Bilateral trade consultations were held with Poland and Hungary. The Minister of State for Trade visited Romania and Czechoslovakia in May 1981 and signed a long-term economic agreement with Romania. The Department sponsored information booths and regular stands at trade fairs in Poland, Czechoslovakia, Yugoslavia and the German Democratic Republic. The Department also sponsored some 15 trade missions to and from Eastern Europe, including a mission of the Romanian Minister of Machinery.

BUREAU OF LATIN AMERICAN AND CARIBBEAN AFFAIRS

Canadian exports to Latin America and the Caribbean remained at the same level in 1981-82 as in 1980-81, despite economic difficulties in the region. Canadian exports totalled \$3.8 billion, the major markets being Mexico, Brazil and Venezuela. Some 40 percent of sales to the region were of fully manufactured goods. Our leading market in the region is now Mexico, up from third place a year ago. Exports to Mexico have tripled since 1976 and amounted to \$715 million at the end of 1981.

The Department carried out 54 export trade promotion projects. Among these were participation in seven trade fairs, 31 incoming delegations of buyers or senior government officials, and 16 outgoing trade missions. The most notable project was the participation of 37 Canadian companies at the Pacific International Trade Fair in Lima, Peru, the largest Canadian group ever, at a Latin American trade fair. Notable results were also gained by 18 companies exhibiting at the Acapulco Mining Show in Mexico. Canadian trade missions visited Panama, Mexico, Cuba, Trinidad, Brazil, Chile, Colombia, Ecuador, Peru and Venezuela; while delegations of buyers and senior government officials were brought to Canada from a number of South American, Central American and Caribbean countries. The Minister of State for Trade led delegations to Venezuela, Colombia, Brazil, Trinidad and Mexico.

The Department, together with the Export Development Corporation (EDC), provided marketing and financial support which helped Canadian companies obtain major contracts for projects which should yield more than \$1 billion in Canadian exports over the next few years. These contracts cover a wide range of goods and services in such fields as transportation, urban development, power, mining, forestry, pulp and paper, communications and education.

ere was considerable trade relations activity during the year between Canada and Latin America and the Caribbean. As a result of these initiatives, an Economic Cooperation Agreement was signed with Ecuador and a Framework Agreement was signed with Venezuela. In addition, Canadian government officials participated in the Canada/Brazil Joint Economic Committee Meeting in Brazil.

The Department continued to support the activities of the Canadian Association-Latin America and the Caribbean (CALA) and the Brazil/Canada Chamber of Commerce. This included: the CALA-sponsored bilateral Businessmen's Committee with Argentina; the CALA Seminar in Toronto on the Latin American and Caribbean Market; CALA/CAIC Roundtable Discussions in Toronto on joint venture opportunities in the Commonwealth Caribbean; and CALA missions to Central America, Washington, Barbados and Trinidad.

Mexico

The Canada-Mexico Trade Committee held its first meeting in 1981. This organization was established to reduce impediments to bilateral trade and provide a forum for the discussion of trade matters of interest to both countries. The meeting took place in Ottawa and was co-chaired by the Deputy Minister of Industry, Trade and Commerce for Canada and the Deputy Minister of Commerce for Mexico.

The first of a series of Export Development Plans, comprehensive approaches to selected markets, dealt with Mexico. The plan was made public in April 1981. Plans were begun for Venezuela and Brazil.

The Prime Minister visited Mexico in January 1982, accompanied by a group of 27 senior Canadian businessmen. The visit was partly intended to lend political support to the bid of Atomic Energy Canada Limited for the supply of four 600 MW CANDU nuclear reactors. The formal proposal for the nuclear project was submitted on February 1, 1982 and included, in addition to commercial and technical bids, a financial offer which required extensive backing from the Canadian government. A number of other high-level visits, including several by the Minister of State for Trade, also contributed to the government's support of the ECL proposal.

More than 75 Canadian firms participated in the technology for the People Fair in Mexico City, sponsored by the CIDA Industrial Cooperation Division and opened by the Minister of State for Trade. A mission of senior executives of Canadian

high technology firms visited Mexico in March 1982, sponsored and led by officials from the Department.

South America

The tempo of our commercial relations with Brazil also continued to increase, with several high-level exchanges of visits between political leaders and business people from both countries. In June 1981, the Minister of State for Trade hosted a visit to Canada by the Governor of Sao Paulo, Brazil's leading industrial state, accompanied by a large group of Brazilian business leaders. In December, the Minister led a mission of business people to Brasilia and Sao Paulo in support of a number of Canadian firms pursuing major capital project opportunities in Brazil, primarily in the fields of communications, aerospace, transportation and power generation. The mission was an important step in the Department's ongoing efforts to help Canadian companies win a contract to supply the space segment of Brazil's new domestic satellite communications system.

In December 1981, Canada was awarded a \$215 million contract for the development of the Tintaya copper mine in Peru. SNC of Montreal will supply the engineering, design, procurement and construction management for the project.

A Canadian embassy was officially opened in Quito by the Minister of State for Trade in March 1982, during a trade mission to Ecuador. Canadian business people have been very active in the Ecuadorian market, particularly in the hydroelectric, petroleum, transportation, and education sectors.

BUREAU OF PACIFIC, ASIAN, AFRICAN AND MIDDLE EASTERN AFFAIRS

Several major projects were undertaken in the Pacific, Asia, Africa and the Middle East, regions that are of growing importance as trading partners with Canada. During the past year the Office of Overseas Projects was merged with the bureau to provide greater focus on the development of trade in these high-potential markets.

The second Pacific Rim Opportunities Conference (PROC II) took place on February 22-24, 1982 at the Harbour Castle Hotel in Toronto under the initiative of the Canadian Committee of the Pacific Basin Economic Council (PBEC). Over 80 speakers and panelists took part in the conference, including the Minister of State for

Trade, the Secretary of State for External Affairs, a financial consultant to the Government of Malaysia, and the editor of the **Far Eastern Economic Review**. Panelists for the individual country workshops, and for the workshops of general interest such as joint ventures, export financing, and importing, included senior trade commissioners posted in the Pacific, representatives of academic institutions and successful business people active in the Pacific. Total registration, expected to be about 250, was over 400.

Japan

Japan remains Canada's largest overseas market, with two-way trade between the two countries reaching \$8.5 billion in 1981-82. However, Canada's surplus declined to \$460 million compared to \$1.6 billion in 1980-81, due largely to increased motor vehicles imports.

The lack of a satisfactory arrangement on Japanese exports of motor vehicles to Canada is the only major issue that mars an otherwise smooth and healthy economic and trade relationship. The fourth Canada/Japan Joint Economic Committee and the fifth Canada/Japan Businessmen's Conference, which met in Japan this year, contributed in great part to fostering the spirit of trust and friendliness that characterizes relations between Canada and Japan.

The Minister of State for Trade visited Japan in March 1982. Besides seeking a satisfactory arrangement with regard to the automobile issue, the Minister sought to increase the sale of Canadian products to the Japanese market, particularly in light of recent trade liberalization measures.

The Canada Trade Centre in Tokyo has been in operation for three years. It has held 30 shows, assisted 406 Canadian firms and been visited by 10 400 Japanese trade visitors. Sales generated by the shows amounted to \$100 million.

Australia and New Zealand

Australia usually ranks as Canada's sixth largest market for exports of end products. In 1981-82, shipments of manufactured goods represented more than one-third (\$307 million) of total Canadian sales to that market.

We are continuing to accord priority to Australia in our marketing activities. In October, a three-year development plan was released for Australia, designed to assist Canadian exporters in obtaining a greater share of the Australian market. We presently supply about 2.7 percent of

total Australian import requirements. In recognition of the market potential offered by Western Australia, the Minister of State for Trade announced in November 1981 that Canada would be establishing an office in Perth.

In 1981-82, Canada-New Zealand two-way trade totalled some \$285 million. Manufactured goods account for about half of our total sales to this market. New Zealand also holds considerable promise for project opportunities. In this regard, an Alberta company was recently awarded contract for a \$200 million chemical-grade methanol plant. A \$65 million EDC loan has been signed with Petralgas Chemicals, a New Zealand producer, to support the sale of Canadian goods and services to this project.

Pacific

A major Canadian trade initiative in Papua, New Guinea concerns the \$1.7 billion Ok Tedi development. This project entails the complete mining, processing, energy, water and townsite facilities to recover gold bullion and copper concentrate from an isolated western location. In February 1982, EDC announced the signing of a U.S. \$88 million loan agreement to support Canadian equipment and services sales to Ok Tedi Mining Limited. Some 60 Canadian suppliers are now prequalified to bid on this project.

Far East

China continued to be a large market for Canadian products, with sales of \$1.0 billion in 1981. Wheat accounted for almost 70 percent of our exports. In recent years, there has been little project-related activity in China, owing to economic readjustment policies, although there is evidence this may be changing.

In August 1981, the Secretary of State for External Affairs visited the People's Republic of China. During this visit it was announced that Canada would be undertaking a bilateral development assistance program in China.

Canadian awareness of and participation in the Indian and Pakistani market increased in 1981-82, with export levels rising to \$346 million for India and \$89 million for Pakistan. A Canada/Pakistan Trade and Economic Council, a private-sector-funded business group, was formed and held two meetings during the year.

The Pakistani Minister of Petroleum and Natural Resources visited Canada at the end of the fiscal year to study oil and gas equipment and the service industry.

area remains Canada's fourth largest export market in the Far East, with two-way trade of over \$1 billion in 1981-82. Canada's exports to Korea amounted to \$446.2 million, an 11.5 percent increase from the previous year. The decline was due to delayed effects of Korea's economic recession and to the fact that shipments for the CANDU nuclear reactor, nearing completion at Wolsung, ended in 1980. A number of large contracts signed in the reporting year will be reflected in 1982-83 statistics.

Over 46 percent of Canada's exports to Korea have consistently been semi-and fully-manufactured goods, a significantly higher percentage than exports to other Asian markets. The recognition of Korea's importance as a market for Canada led to the recent publication of **Canada's Export Development Plan for Korea**. Major growth sectors identified are CANDU reactors, coal, uranium, telecommunications, cereal grains and oilseeds, aircraft and pulp.

The visit of the Minister of State for Trade to Korea in June 1981 followed closely the visit to Canada in April 1981 of the former Korean Minister of Commerce and Industry. Both ministers were accompanied by senior business people. The Prime Minister's visit to Korea in September 1981, the first visit by a Canadian Prime Minister, will be reciprocated in August 1982 by the visit of the Korean President to Canada. In addition, the Canada-Korea Business Council held its first annual meeting in Seoul in September 1981.

Canadian firms were successful in negotiating additional contracts for the extension of a major thermal power station in Thailand. Canadian involvement to date is in excess of \$150 million. Further expansion is expected for 1982-83. The Thai Minister of Industry visited Canada in July 1981.

Canadian firms were retained to implement Phase II of the Bukit Asam coal mining, rail and sea transportation and thermal power station project in Indonesia. Total Canadian involvement in place and committed is now in excess of \$371 million. An Indonesian investment mission visited Canada in June 1981.

Africa

Canadian exports to Africa reached \$1.5 billion in 1981-82, up from \$873 million in 1979-80. Exports to Africa now account for approximately 16 percent of non-U.S.-destined Canadian exports and continue to grow at an acceptable rate. While Algeria (\$389 million), Nigeria (\$96 million) and Egypt (\$127 million) represent the largest existing and

potential markets in Africa, Canada substantially increased its market share in Morocco, Tunisia, Libya and Cameroon. Exports to these countries over the year rose from \$211 million to \$368.4 million. The sales of semi-fabricated and fabricated products to Africa in sectors such as transportation (surface and air), energy, communications and irrigation increased during the period under review.

Imports to Canada more than doubled in 1981-82 (\$1.2 billion), due to increased oil imports from Algeria, Libya and Nigeria.

During 1981-82, a number of trade promotion initiatives supported exports to Africa. The Prime Minister promoted trade during his visits to Kenya and Algeria and the Minister of State for Trade led a delegation of business people to Kenya, Zimbabwe and Swaziland. The Minister of Energy, Mines and Resources promoted cooperation in the energy sector during his visit to Egypt. The Minister of State for External Relations led Canadian delegations to bilateral commission meetings with Algeria, Morocco and Tunisia, in Algiers, Rabat and Tunis. Bilateral Commission meetings were also held with the Ivory Coast, Zaire and Senegal.

Most African countries sent delegations to Canada for trade discussions between government and industry. These visits consisted of ministerial missions and visits of senior officials.

There were 27 incoming and outgoing missions between Canada and Africa in 1981-82 and the Department participated in international trade fairs in Algeria, Morocco, Zimbabwe and the Ivory Coast. The Parliamentary Secretary to the Minister of State for Trade was the official host on Canada Day at the Algiers International Trade Fair. The Department also participated in the UN Conference on New and Renewable Sources of Energy.

The Middle East

There was a further significant expansion in Canadian exports to the Middle East in 1981-82, reflecting cooperation between the federal and provincial governments, private industry and trade associations. Exports of merchandise for 1981-82 totalled \$1.139 billion, compared to \$848 million in 1980-81. Exports of services in the same period are estimated to approach \$500 million. The largest markets in the region were Saudi Arabia (\$455 million), Iraq (\$294 million) and Israel (\$124 million). Imports, principally oil, declined from \$3.003 billion in 1980-81 to \$2.570 billion in 1981-82.

The Department sponsored several trade missions and assisted trade missions organized by provinces, all of which were successful in introducing new exporters to the region and expanding the sales of experienced firms.

In May 1981, the Minister of State for Trade visited Saudi Arabia for high-level discussions with Saudi ministers, senior officials and Canadian companies active in the country.

In Iraq, the Minister represented Canada at the opening of the Baghdad International Trade Fair, October 1-15, 1981. Canadian exhibitors were successful in marketing automotive products, telecommunications equipment, wheat and construction equipment. However, Canadian export opportunities in Iran continued to be seriously affected by the political and economic situation in the country and by the Iran/Iraq conflict.

DEFENCE PROGRAMS BUREAU

The Defence Programs Bureau was formed in 1959 (within the Department of Defence Production) to meet the needs of the Canadian Government for a highly specialized industrial and trade oriented group to promote exports of Canadian defense products to our allies and other friendly nations.

Specific objectives of this bureau are:

- to identify and follow up export opportunities for Canadian producers of defence and defence-related products;
- to establish and manage Canadian participation in bilateral and multilateral cooperative defence research, development and production (RDP) agreements; and
- to assist Canadian industry in making contacts and negotiating with foreign government agencies with respect to defence and related export marketing endeavours.

The bureau has four divisions.

- The U.S. Division manages the Canada/United States Defence Development and Defence Production Sharing Arrangement (DD/DPSA). It has responsibility for developing the U.S. defence market for Canadian prime and subcontracts, assessing U.S. market potential for Canadian defence products, and initiating cooperative defence R&D projects with U.S. military services.

- The Overseas Division manages Research, Development and Production (RDP) agreements with seven NATO countries and Sweden. It pursues opportunities for Canadian industrial involvement in NATO projects, and market development in cooperation with industry for Canadian defence products in European NATO and other friendly countries.
- The Project Marketing Division assists Canadian industry in marketing defence and defence-related products and assesses the benefit to Canada from Canadian defence procurement.
- The Market Research and Analysis Division conducts market research for specific products and does evaluation and analysis related to the defence export market. It also collects, records and analyses bilateral defence trade data.

Defence trade increased during 1981-82. Exports reached \$1.350 billion and imports rose to \$1.139 billion. The majority of this trade was with the United States. Nearly 60 percent of defence exports to the United States were subcontracts to American defence contractors, which was of particular benefit to smaller Canadian manufacturers of defence and related high-technology products.

A highlight of the year was the reaffirmation by the Prime Minister and President Reagan of the Canada/United States Defence Development and Defence Production Sharing Arrangement (DD/DPSA) during their meeting in Ottawa. Meetings with U.S. government and military officials and participation in seminars, trade missions and trade fairs also helped to stimulate increased defence business opportunities for Canadian industry in the United States.

The bureau sponsored its twentieth High Technology Industries Export Conference. A total of 61 trade commissioners from around the world attended the Ottawa conference and held over 4 000 interviews with Canadian business people.

Canada made a major sale of 10 Buffalo aircraft to Egypt, with an option of an additional six.

REGIONAL OFFICES IN CANADA

The Department maintains regional offices across Canada which provide the full range of departmental services to the Canadian business community. Decentralization of responsibility for the delivery of the Department's programs, particu-

ly to small and medium-sized businesses, significantly improved the access of business people to the broad range of trade and industrial development programs offered by the Department during the year.

The role of the regional offices was recently expanded in the areas of federal and provincial relations and tourism promotion, to improve responsiveness to the daily needs of the Canadian business and public sectors while ensuring a close liaison with Canada's trade posts abroad. This expanded role resulted in a significant increase in the level of activity in regional offices.

Each regional office operates a business information centre, providing information on business assistance programs offered by the federal and provincial governments. During 1981-82, these centres received 7 891 business visitors and processed 168 941 enquiries.

Approximately 120 officers are engaged in industrial development, trade and tourism activities in the regional offices.

The regional offices processed 3 472 applications under the Program for Export Market Development (EMD) and 1 002 applications under the Enterprise Development Program (EDP) in 1981-82. They also handled 1 878 enquiries relating to foreign investment in Canada.

TRADE COMMISSIONER SERVICE

The Trade Commissioner Service operated a network of 92 offices in 68 countries during 1981-82, employing 230 trade commissioners and 170 locally-engaged commercial officers. Although the Trade Commissioner Service was transferred from ITC to the Department of External Affairs in January 1982, its mandate to serve the Canadian business community abroad remains unchanged.

The foreign posts had an important impact on trade relations, trade policy and export development. They identified export opportunities and helped Canadian firms make use of this information. During the year these offices played a role in Canadian export contracts worth \$4.157 billion, identified almost 3 000 new buying connections, assisted over 30 000 Canadian business and government visitors, answered 109 000 export enquiries and participated in 549 trade fairs.

U.S.A. TRADE DEVELOPMENT BUREAU

In 1981-82, Canada/U.S. trade reached a record value of \$107.8 billion. Canadian exports to the United States totalled \$53.7 billion and imports from that country were \$54.1 billion. Because of the size of the U.S. market and its importance to Canada's export performance, trade programs are needed which are specifically directed at not only maintaining Canada's share of that market but introducing new Canadian products to stimulate export growth.

The U.S.A. Trade Development Bureau is the focal point for the Department's marketing activities in the United States. It is responsible for the Department's Trade and Industrial Development (TID) Program, which maintains 14 trade posts in the United States. The TID Program places particular emphasis on small to medium-sized firms and first-time exporters.

The main components of the program are market research, export education, trade promotion, congressional and corporate liaison reporting, ministerial visits, and industrial development.

Trade Promotion. Promotion activities initiated and implemented by the bureau fall into two categories: long-term major activities and short-term responsive activities.

Long-term major promotional activities are those which require extensive pre-planning and represent steps in the implementation of an overall marketing strategy for an industrial sector. These included 46 trade fairs and trade missions organized by the bureau in 1981-82. Examples were departmental participation in the Offshore Technology Conference in Houston, the Snow Show in Las Vegas, the Farm Progress Show in Illinois and numerous automotive parts and accessories shows throughout the United States. The Department also sponsored incoming buyers from all regions of the United States to the Canadian Fashion Fair in Winnipeg and the Children's Apparel Manufacturer's Association Show in Montreal.

Short-term responsive activities are those which respond to newly identified marketing opportunities and which can be implemented with industry support with shorter lead-times and at low cost. Fifty-one such promotions were undertaken during the year, ranging from solo industry exhibits held in Canadian consulates throughout the United States to a direct-to-the-consumer radio, newspaper and point-of-purchase promotion of Canadian fish in the Chicago area.

Congressional and Corporate Liaison. The successful corporate liaison program was recently expanded to include congressional liaison. This program has been useful in providing a cross-section of U.S. corporate views on current issues in Canada/U.S. trade relations, as well as an indication of how Canada is perceived as a location for investment. By including contacts with influential congressmen and senators, the program provides another informal mechanism for dealing with bilateral issues between the two countries.

Ministerial Visits. The bureau, in conjunction with trade posts in the United States, initiated and recommended to the Minister of State for Trade a program of official visits to a number of U.S. cities and regions to promote Canadian goods, services and interests. The Minister visited Dallas, Houston, Chicago, Seattle, San Francisco and Los Angeles to meet with senior business people and public officials, participate in conferences, and officially open the Canadian exhibits at various trade shows.

Industrial Development. Under its industrial development program, the bureau sponsored "Investment in Canada" seminars in Minneapolis and Chicago. At the Chicago seminar in March 1982, Canadian Government officials addressed a U.S. business audience concerning the objectives of the Foreign Investment Review Act (FIRA) and International Labour Adjustment Programs in the context of "Economic Development for Canada in the 80s". At the invitation of provincial government offices in Chicago, U.S. business people who had invested in Canada related their experiences concerning specific investments in Ontario and Quebec.

INTERNATIONAL TRADE RELATIONS

OFFICE OF GENERAL TRADE RELATIONS

The Department's Office of General Trade Relations participated actively in multinational trade consultations during the past fiscal year. These consultations were largely aimed at reducing the mounting protectionist pressures being imposed on world trading systems as a result of the prolonged recession of national and international economies.

Recognizing the dangers in this protectionist trend, the Ministerial Council of the OECD reaffirmed unequivocally in June 1981 the commitment of member countries to the principles of the open and multilateral trading system. In addition, contracting parties to the General Agreement on Tariffs and Trade (GATT) agreed in November to hold their 1982 annual meeting at the ministerial level. The aim of this meeting will be to address current trade problems and to develop a work program for the 1980s.

Significant GATT-related activities in 1981-82 included the progressive implementation of the tariff and non-tariff results of the multilateral trade negotiations (MTN), which continued on schedule. Other GATT activities of particular note took place in the field of dispute settlement. The panel established to examine the U.S. embargo on tuna and tuna products from Canada found this action inconsistent with U.S. obligations under GATT. Canada requested that a panel examine the use of U.S. legislation with respect to alleged patent infringement; however, the panel did not accept Canadian arguments. The United States engaged in consultations with Canada and subsequently requested that a GATT panel be established to examine certain trade-related aspects of the Foreign Investment Review Agency's activities. GATT activities during the year also focused on the implementation of MTN results and the administration of the non-tariff measure codes and agreements concluded during the Tokyo Round.

In January 1982, Canada took part in informal trade discussions with its major trading partners, namely, the United States, the European Community and Japan. These discussions, at which Canada was represented by the Minister of State for Trade, provided an opportunity to exchange views on the major challenges facing the international trading system and to gain a better understanding of the international trading environment from the perspective of each participant.

Canada participated in other international trade policy discussions at both the general and specific levels at meetings within GATT, the OECD, the UN Conference on Trade and Development (UNCTAD), the Ottawa Economic Summit, the North/South Summit at Cancun, the Commonwealth Heads of Government Meeting in Melbourne, and multilateral trade discussions at ministerial and official levels with major industrialized countries. Subjects covered included export financing, transportation, East-West commercial relations, and trade aspects of investment and competition policies. A number of issues were considered in the context of North-South relations, among them transfer of technology, the Generalized System of Preferences, and the further integration of the more advanced developing countries into the world trading system.

Major industrial trade policy issues which required attention during the year included the parliamentary review of overall import policy carried out by the Subcommittee on Import Policy of the House of Commons Standing Committee on Finance, Trade and Economic Affairs; policy initiatives with respect to offshore development; trade-related aspects of investment policy; and the industrial benefits provisions of various domestic economic policies. Involvement in OECD activities focussed on the organization's Industry Committee and the Steel Committee. High priority was also given to sectoral policy issues affecting trade in civil aircraft, telecommunications equipment, petrochemicals, the health-care products industry, and shipbuilding.

With respect to commodity trade policy, Canada participated in negotiations to bring the Sixth International Tin Agreement and the first International Natural Rubber Agreement into effect. Canada also took part in a series of preparatory meetings on tea and tropical timber, which seem likely to result in agreement on the broad outlines of the international arrangements for these commodities. The international agreements on sugar and coffee are to be extended this year and Canada participated actively in both sets of negotiations, based on its position as a major consumer. Canada signed the agreement establishing the Common Fund in January 1981 and has continued to contribute to the process of formulating its administrative rules and regulations.

Agricultural concessions resulting from the MTN continued to be implemented. Bilateral

agricultural trade negotiations were conducted on a number of products of interest in Canada's export and import trade, particularly on cheese.

OFFICE OF RELATIONS WITH OECD COUNTRIES

Consultations and meetings in 1981-82 between high-level officials of Canada and trading partners in OECD countries resulted in progress that was favourable, in a large part, to Canadian exporters. These included trading resolutions in European and Pacific area markets.

The office continued to provide the business community with information regarding tariffs and import regulations for the countries within their jurisdiction.

European Division

Progress was made in resolving a number of bilateral trade issues between Canada and the Economic Commission for Europe (ECE), including access to the ECE market for high-quality beef under the ECE's 10 000 tonne fixed-levy quota, which was negotiated during multilateral trade negotiations (MTN); the resumption of seed potato exports to Italy; and carry-over of a shortfall in sales of Canadian cheddar cheese to Europe under the Canada/ECE MTN Cheese Arrangement.

Consultations were held with the ECE under GATT Article XIX with respect to the imposition of minimum import prices on certain fish imports into the U.K. market. Representations were made to the Economic Commission for Europe in Canada, primarily in the agricultural and fishery sectors, including the ECE's administration of tariff rate quotas for certain fish products established under the Canada-ECE Long Term Agreement on Fisheries; and ECE proposals to increase the import levy on grain screenings and alter phytosanitary regulations on Canadian lumber exports.

Canada entered into consultations with the Economic Commission for Europe under GATT Article XXIV(6) concerning the impact of Greek accession to the European Economic Community (EEC) on Canadian exports.

Arrangements to limit price undercutting on cheese exports to Canada were concluded with Austria, Switzerland and the Scandinavian countries. Consultations under GATT Article XXII were also held with Spain on the operation of the Spanish import regime for fish products.

The fourth meeting of the Canada-European Community Joint Cooperation Committee was held in Ottawa in July 1981 and semi-annual consultations

were held with the Economic Commission for Europe in Brussels in April and November 1981.

Pacific Division

In June 1981, the Japanese Government agreed to restrict exports of Japanese passenger vehicles to Canada to the level of 174 213 for the period April 1, 1981 to March 31, 1982. This action was taken in light of the depressed state of the Canadian automotive market and in response to Canadian concern that action by Japan to restrict exports of passenger vehicles to the United States, taken earlier in the year, could result in the diversion of vehicles to the Canadian market.

In December 1981, the Japanese Government announced measures to promote increased imports into the Japanese market. This action was taken in response to intensive pressures from the United States and the ECE, with which Japan has very large merchandise trade surpluses. The Japanese measures included the advanced staging of tariff cuts agreed to by Japan in the recently concluded Tokyo Round of multilateral trade negotiations, undertakings by the government of Japan to work toward the liberalization of a range of non-tariff barriers to trade affecting access into the Japanese market. Although the measures were not directed to Canadian interests, Canadian export should benefit somewhat from the overall reduction in the level of protection in Japan.

Following an extensive review of trade and economic relations with Australia and New Zealand, negotiations were undertaken with officials of the New Zealand Government, resulting in the signing of a new bilateral Canada-New Zealand Trade and Economic Agreement in November 1981. The new agreement, which entered into force on January 1, 1982, replaces the previous agreement which had been in operation since 1932. It provides for continuation of preferential tariff arrangements and regular consultations on trade and economic matters of interest to both governments. The agreement also provides for expansion of the bilateral relationship to cover such areas as industrial cooperation, joint ventures, and cooperation in third markets.

Discussions with Australian Government officials were held in Ottawa in November 1981 to explore ways and means of improving bilateral trade arrangements to reflect changes which have taken place in the international trading environment. Several proposals were put forward for further study and discussions will continue in the new year.

The division reviewed reports issued by the Australian Industries Assistance Commission to assess the impact of recommendations altering trade

arms of access for Canadian products on the Australian market. Representations on behalf of Canadian exporters were undertaken as appropriate.

OFFICE OF SPECIAL TRADE RELATIONS

Textiles. A program to assist the textile industry to restructure and modernize was announced on June 19, 1981, following a report by the Textile and Clothing Board. The program established the Canadian Industrial Renewal Board to assist the industry in restructuring and modernizing, and extended the period of border protection to provide greater stability during the transition. The Office of Special Trade Relations (OSTR) undertook negotiations with the principal suppliers of low-cost textiles with a view to including arrangements covering the 1981-86 period.

Multi-Fibre Arrangement. which provides the framework for negotiating bilateral restraining arrangements, expired on December 31, 1981. As Canada's representative, OSTR actively participated in discussions of the Multi-Fibre Arrangement for a further four-and-a-half year period. The Arrangement was successfully renegotiated and now reflects current Canadian needs more closely.

Footwear. On November 24, 1981, the government announced its decision to replace the global quota on imports with a global quota covering only non-leather footwear, in accordance to the Anti-Dumping Tribunal's report of February 1981. The decision reflected the tribunal's finding that the domestic industry could compete with imports from developed countries, which were primarily leather. The non-leather quota is for three years ending November 30, 1984 and provides for a three percent annual growth rate.

Coffee. In keeping with its obligations as a member of the International Coffee Organization (ICO), Canada placed coffee on the Import Control List. Individual permits were required for the import of coffee effective February 1981 to provide more accurate statistics to the ICO.

Sugar. Sugar was similarly placed on the Import Control List to satisfy Canada's obligations as a member of the International Sugar Organization. Individual permits are required for imports to provide accurate statistics to the organization and control imports from non-member suppliers.

Beef and Veal. On March 14, 1981, beef and veal were removed from the Export Control List. In prior years Canada regulated exports of beef and veal in the context of an exchange of letters with the United States. With the removal of U.S. import controls, the intergovernmental understanding was no longer operative and this item was removed from the list.

Specialty Steel Products. Effective March 25, 1981, specialty steel products were removed from the Export Control List. This item, which had originally been placed on the list in December 1976 in response to a U.S. quota on specialty steels, was removed following termination of that quota.

Area Control. On March 3, 1981, Iran was removed from the Area Control List following the release of hostages taken at the U.S. Embassy in Teheran.

On July 3, 1981, the Area Control List was amended removing reference to the People's Republic of China. This action was taken in recognition of improved relations between Canada and China.

OFFICE OF U.S. RELATIONS

Bilateral trade with the United States continued to increase in 1981 and through the first quarter of 1982. There was also a growing concern over reciprocal restrictive trade legislation.

Two-way trade between Canada and the United States totalled almost \$107.8 billion in 1981-82. The value of Canadian exports to the United States was \$53.7 billion, or about two-thirds of our sales to the world as a whole. Our imports from the United States were valued at \$54.1 billion, or some 70 percent of all Canadian imports.

On January 1, 1982, the third of eight phased reductions in customs duties on most U.S. tariff items -- as agreed in the Tokyo Round of multilateral trade negotiations -- came into effect, offering improved access in the U.S. market for many Canadian products. In other respects, however, the picture was less encouraging. While the bulk of our trade continued to flow freely, new "Buy America" legislation at both the federal and state level was a source of serious concern to Canadian exporters, particularly in the steel and steel products sector. Other protectionist pressures were evident in border state protests against imports of Canadian potatoes and softwood lumber;

in proposals to further restrict imports of uranium; and in the introduction of a number of narrow "reciprocity" bills in Congress which would make access into the U.S. market contingent on the treatment applied to U.S. goods by other countries.

The U.S. Trade Relations and Tariff Affairs Divisions continued to provide Canadian exporters with background information, advice and direct assistance on all market access issues, including such concerns as policy developments; specific trade actions; tariff classification problems; labelling, food and drug and other non-tariff regulations.

INDUSTRY AND COMMERCE DEVELOPMENT

The Industry and Commerce Development (ICD) Group consists of a number of industry sector branches and related staff groups with responsibility for industrial and trade development in Canada's manufacturing and processing industries and in selected service industries including construction, consulting, distributive trades, and transportation services. The principal role of ICD for the Department and the government is to provide a source of industry sector knowledge and expertise required for the development of policies and the performance of programs and services supporting industrial innovation, investment, productivity and export marketing.

In the fiscal year under review, ICD branches played a leading role in a number of important government initiatives. Work on industrial and regional benefits from major capital projects led to the announcement in August 1981 of industrial benefits, objectives and guidelines for owners and sponsors of major projects, and the creation of an Office of Industrial and Regional Benefits within the Department to ensure Canadian suppliers a full and fair opportunity to compete.

A high priority attached to the development of electronics and its application to Canadian manufacturing products and processes gave rise to the announcement in January 1982 of a three-year program, Support for Technology Enhanced Productivity (STEP), with funding of \$93 million (\$52.1 million plus the Special Electronic Fund), to promote the manufacture and use of electronics.

A new policy for the textile and clothing sectors, with funding of \$267 million over five years, was made public in June 1981. The program provided for the establishment of the Canadian Industrial Renewal Board to coordinate industrial development measures, including community adjustment, and the negotiation and implementation of supportive trade policy measures.

A number of initiatives were undertaken in the automotive sector, including the designation of auto parts as an industry sector eligible for assistance under the Industry and Labour Adjustment Program (ILAP), the implementation of constraints on exports of automobiles from Japan, the conclusion of a duty-free entry arrangement with Volkswagen in support of proposed investment in Canada.

In the aerospace sector, work continued on the monitoring and implementation of the industrial benefits provision of the contract with McDonnell Douglas for the supply of Canada's new fighter aircraft.

AEROSPACE AND MARINE BRANCH

Aerospace Directorate

The aerospace sector continued to expand during the year, with sales approaching \$3 billion, an all-time high. Employment, however, has shown some regional reduction.

The industry continues to be predominantly related to international export markets and thus makes a significant contribution to Canada's balance of trade in manufactured goods.

The directorate initiated and sponsored a number of new activities. Among these activities were development of the Light Air Cushion Triphibious Aircraft (LACTA), a mission to Poland, and research to identify possible industrial cooperation opportunities, including a study of future potential for helicopter manufacture in Canada.

Activity on existing programs included the extension of sales financing under the Enterprise Development Program to include the DASH-8, a new phase of activity to exploit augmentor wing technology, development of higher power versions of the PT-6 and JT-15D engines, improved versions of the PT-6, and the launching of the new PW-100 engine series. Monitoring activities continued for established projects such as the Challenger, special engineered products and military reconnaissance drone systems. New arrangements were put in place to monitor the DASH-8 program on an interdepartmental basis.

Negotiations continued under GATT to expand duty-free coverage for aircraft and engine parts in overseas markets under the terms of the Agreement on Trade in Civil Aircraft.

The Aerospace Industrial Benefits packages negotiated as part of major government procurements include the Lockheed CP-140 Aurora, McDonnell Douglas CF-18 and Air Canada fleet

purchases. In addition, two new projects are under negotiation: the Low Level Air Defence (LLAD) missile program and the C-130 wing modification program. Audit and control practices were strengthened and expanded through increased computerization of the industrial benefits claims and approvals process.

The directorate had considerable involvement in the analysis of possible Canadian industrial participation in the development and production of new 150-passenger transport aircraft at Airbus Industries, Boeing and McDonnell Douglas.

Under the Defence Industry Productivity Program, delivery of research and development, source establishment and plant modernization projects to the industry sector as a whole reached an all-time high involving some 130 projects.

Marine Directorate

During 1981-82, activity in the oceans, ship-building and repair industry was quite uneven, with high levels of employment in Western Canada and Ontario but soft spots in the Atlantic provinces and Quebec. There has been very little demand for new conventional ships. Most of the contracts received during the year were related to offshore (Atlantic and Beaufort) hydrocarbon activity. Ship repairs and conversions continued to represent approximately one-third of shipyard activity.

Manufacturers of ship components had sales generally at the level of the previous year. Intense foreign competition, particularly in the offshore oil and gas sector, has prevented expected increases in sales profits in some instances. Manufacturers of on-board fishing gear have shown more interest in exporting to the United States and were generally enthusiastic about prospects there. Implementation of the Shipbuilding Industry Assistance Program (SIAP) continued in relation to this interest.

Market development support was provided through national displays at the Offshore Technology Conference in Houston, Texas, the Offshore Europe show in Aberdeen, Scotland and the Oceanology International show in Brighton, England, as well as information booths at a number of other international shows.

With respect to industrial benefits from government procurement, the directorate participated in the program office created for the acquisition of

the Canadian Patrol Frigate by providing management of the industrial benefits function.

CANADIAN MARKETING OPPORTUNITIES PROGRAM

The Canadian Marketing Opportunities Program (CMOP), established in October 1981, has taken positive steps to increase this country's share of the Canadian market through the purchase of Canadian-made products.

The program complements and supplements the activities of the Office of Industrial and Regional Benefits and the industry sector branch of the Department. CMOP has initiated discussions with trade associations, to encourage voluntary programs with their member companies to develop policies for replacing imports with Canadian-made products. Major thrusts have been launched with public sector institutions, the health-care products industry, and the petroleum industry.

This Department and the Department of Supply and Services have joined the provinces to arrange a program that will encourage some 11 000 public purchasers to give Canadian manufacturers an opportunity to bid for their business.

Discussions with representatives of the petroleum industry led to their decision to explore, on a voluntary basis, the potential for more purchases of Canadian-manufactured goods. Supplier development is important to this industry because of the economic benefits of having secure domestic sources of supply. This program, under the stewardship of the petroleum industry, is expected to grow into a major undertaking in the next fiscal year.

The food processing industry, under the auspices of the Grocery Products Manufacturers of Canada, is in the early stages of determining the kinds of opportunity it can offer for the development of the domestic market for Canadian manufacturers.

The Mining Opportunities Program, started in 1980-81, has featured a successful reverse trade show. Since then, the mining industry has developed closer ties with the supplying companies through special-purpose standing committees. These new ways of dealing with the problems of suppliers and buyers have been encouraging. The experiences with this first initiative to build a stronger Canadian market have been a useful guideline for the programs currently under way.

CHEMICALS BRANCH

The chemicals industry achieved an impressive rate of growth in both production and exports in 1981-82 despite adverse conditions in most other areas of the economy. However, by the end of the period, the effect of the economic downturn was resulting in reduced activity. In 1981, shipments in the chemicals and related sectors increased by more than \$2 billion over the year, to a total of \$9.2 billion. There were increases in all sectors, with industrial chemicals showing particular strength. While imports climbed \$800 million, exports rose by more than \$1 billion and exceeded imports by about \$50 million.

Industrial Chemicals

Consultations were carried out with the provinces and the private sector on a policy framework for the development of the petrochemical industry. An interdepartmental task force was formed to study the outlook for the availability and costs of petrochemical feedstocks.

The branch participated in meetings of the International Rubber Study Group, which acts as a forum for information exchange between natural and synthetic rubber producers and consumers. Canada ranks fifth in the western world in synthetic rubber production and seventh in combined natural and synthetic rubber consumption.

Involvement in the activities of the Sulphur Development Institute of Canada (SUDIC), a non-profit organization fostering research into uses of sulphur, was continued through membership on the board of directors.

A study was completed on the supply-demand situation for lubricating oil in Canada for the period 1980-85. The study concluded that supply would exceed demand for every year of the period.

Plastics, Rubber and Chemical Specialties

Exports of plastic products continued to rise, with a 20 percent increase in 1981-82 over the previous year. However, imports continued to supply one-third of the domestic market. Two selling missions were held, in Detroit and San Francisco. In March 1982, the Division conducted a market survey for plastic products in Australia and New Zealand and a selling mission has now been proposed. Export seminars for plastics processors were held in Montreal, Winnipeg and Vancouver in cooperation with the industry association.

The branch led two industrial cooperation missions to Europe during the year. At the first, ten

executives of the plastic film extrusion industry examined plastic film and packaging technology in France and West Germany, while the second enabled nine executives of the blow moulding industry to view technology in the United Kingdom, Italy, Switzerland and West Germany.

In October 1981, the branch organized a trade mission to Cuba for industrial rubber product manufacturers. Significant export shipments are resulting from this mission.

A sector analysis of the industrial rubber products industry was initiated and a study of the pesticide industry in Canada was completed.

Health-Care Products

The branch coordinated federal participation at the manufacturing opportunity show on medical equipment and supplies held in Winnipeg in April 1981. The show was organized as part of a federal-provincial initiative to secure a greater share of the domestic market for Canadian producers. As another contribution to this initiative, the branch coordinated the preparation of a made-in-Canada health-care products directory which was published in February 1982. The directory was well received and will, for the first time, enable decision makers and purchasing agents to identify Canadian-made products.

During the year, the branch organized exhibits of Canadian health-care products in Atlanta, Georgia and in the Canadian Trade Centre in Tokyo.

Preparatory work was started in connection with the International Conference on Medical Device Technology which the Department is co-sponsoring with Health and Welfare Canada and the Canadian Association of the Manufacturers of Medical Devices in Toronto in December 1982.

DESIGN CANADA

Design Canada has the responsibility to promote improved design and creativity for industry and business in Canada. The major functions of Design Canada include serving the requirements of the National Design Council and implementing departmental programs to assist the development of industrial design.

Examples of its activities include:

- providing grants to companies in a cost-sharing arrangement with the provinces through the Product Development Management Program (PDMP)

to strengthen the product capabilities of Canadian firms;

- holding design seminars for designers and companies;
- providing design advisory services to companies; and
- administering a scholarship program for graduate students to upgrade the quality of design skills in Canada.

Under PDMP, more than 250 companies were assisted in 1981-82 in developing product design capabilities, resulting in the establishment of 450 new permanent jobs. A wide range of products was developed, including a computerized shopping mall directory system, ocean fishing equipment, agricultural machinery and an underwater submersible scanning drone.

A seminar series entitled "Design in Packaging" was held in several major centres to demonstrate to the packaging industry the role of design in developing innovative, effective and efficient types of packaging. Seminars on "Tourism - Profit by Design" were developed in cooperation with the Canadian Government Office of Tourism. These seminars demonstrated to tourism owners and operators the ways in which design can be used to increase efficiency, attract and satisfy more visitors, and thereby improve competitiveness and profits.

"Design Symposium D³" was held in Montreal in April 1981 as a joint venture with the Université du Québec à Montréal and the Centre de recherche industrielle du Québec. The symposium focussed on the benefits of design utilization and the design process. Lecturers and participants were from Canada, Germany, Italy, the United Kingdom and the United States.

The branch provided advisory services on design to companies, institutions, other federal departments and provincial governments throughout the year.

Twelve design scholarships were awarded on a competitive basis for the 1981-82 academic year for studies in Canada and abroad.

The National Design Council held three plenary sessions in Canadian communities. Design Canada was involved in international forums, including the biannual congress of the International Congress of Societies of Industrial Design (ICSID) held in Helsinki, Finland.

The Chairman's Award for Design Management for 1982 was awarded to Northern Telecom Ltd. A total of 260 submissions were examined to arrive at a list of 10 finalists. This award and the Design Canada Awards of Excellence for Product Design were announced at a presentation organized by Design Canada in Montreal.

ELECTRICAL AND ELECTRONICS BRANCH

The Electrical and Electronics Branch plays a major role in the development of Canada's potential at both domestic and international levels in this rapidly changing field. It works closely with industry in such activities as supporting advanced technology, distributing information, marketing, and legislative planning. The following is an outline of the activities of the branch during the 1981-82 fiscal year.

Policy and Strategy Development

The Support for Technology Enhanced Productivity Program (STEP) was launched in January 1982. The program is designed to enhance the supply capabilities of the Canadian electronics and machinery sectors and to encourage the application and use of new electronic technologies in the products production processes of all industry sectors. The program is funded at a level of \$93 million (\$5 million plus the Special Electronic Fund) over a three-year period.

A report on transborder data flows and the use of computer communications technology in multinational corporations was prepared for the Interdepartmental Task Force on Transborder Data Flow. The project was developed in close consultation with industry associations and was based on information gathered from questionnaires and interviews with a number of the largest multinational companies operating in Canada.

Microelectronics and Instrumentation

As part of the STEP program, centres of advanced technology in industrial applications of microelectronics, were established in association with universities across the country. These centres are designed specifically to deal with questions posed by Canadian companies on the use of microelectronics and to provide technical services. The centres are located at the University of British Columbia, University of Alberta, University of Manitoba, University of Toronto, and University of Sherbrooke. Other centres are currently being considered for the Atlantic provinces.

After initial funding by the Department of \$1 million over five years, the centres are expected to become financially self-supporting. Their principal task consists of providing technical services to industry in applying micro-electronic devices to product designs or to a company's processes.

These centres will also serve as a regional focal point for the dissemination to industry of information on microelectronics and its applications. It is expected that the centres will provide training programs, courses and facilities for regional industry, and that they will transfer microelectronic technology to companies that request their assistance.

Information Processing and Technology

Four development programs approved under the Enterprise Development Program (EDP) and Defence Industry Productivity Program (DIPP) amounted to a total Crown contribution of \$32.5 million. Among these contributions are one to the Control Data Corporation for \$17 million to develop a super mini-computer and another to Mitel Corporation to develop the SX-2000 PBX. Some of the products which will result from these projects are fundamental to the growth of the "Office of the Future" industry.

The division participated in 32 procurement review committees and was involved in producing guidelines on the use of procurement to foster the growth of the Canadian computer industry. As a direct result of these committees, a number of major projects have been undertaken in Canada, including a \$17.5 million R&D centre and a \$5 million software development centre.

The division organized Canadian booths at two of the major computer trade shows, the National Computer Conference in Chicago and SICOB in Paris, and hosted an incoming mission of Belgian exporters and distributors. The division also cooperated with a leading Canadian publisher in producing a new directory of Canadian exporters, *Canada in the World of Computing*, which was distributed to posts around the world. Many small companies were assisted in locating markets for their products and the division worked with a number of multinational enterprises in identifying sources in Canada.

Ongoing activity of the division is to maintain a profile of the Canadian computer and office products industry and participate in initiatives to promote its growth. This is considered critical given the rapidly deteriorating trade deficit in computers and office products, which reached \$1.8 billion in 1981-82. Another

initiative being undertaken is the "Office Communications Systems" program, a joint venture by this Department and the Department of Communications, to study the application of new technologies.

Consumer Products (Major and Portable Appliances)

A new duty remission and tariff program for the television industry for the period after December 31, 1981 is being formulated in consultation with the industry. The Major Appliance Industry was designated under the Industry Specific Restructuring Program and \$15 million over the next two years was allocated to assist companies in this sector in their capital investment plans. The goals are to modernize, automate and consolidate production facilities in order to achieve significant productivity improvements. An increased concentration of division resources was made in the area of export marketing and promotion programs, including market studies and participation in an international trade fair, "Domo Technica", in Cologne, Germany. A full review of possible assistance programs for the portable appliance industry was undertaken during the year and consultation with the industry continues.

Telecommunications

DIPP and EDP support to this industry sector continued at a significant level during this fiscal year. Telecommunications continues to be an active high technology sector in R&D programs and in the Program for Export Market Development.

Two telecommunications trade missions to Japan were completed as part of the government's efforts to expand Canadian exports into this complex market. Space marketing during this period was concentrated in Australia, Mexico, Brazil and the Middle East. A number of space policy documents were prepared in cooperation with the Department of Communications and the Ministry of State for Science and Technology. A start was made in dealing with industrial support and policy activities related to Telidon and Teletext.

Activity in support of the Canadian fibre optics industry subsector was increased during the period. Assistance was provided to some of the telephone companies, including the Alberta Government Telephone Company, to participate in export projects. In addition, marketing support was provided on a large number of specific telecommunication marketing ventures on all continents.

The Telidon industry was supported through intergovernmental and industry committees and

programs such as the Industry Investment Stimulation Program (IISP), Enterprise Development Program (EDP) contributions, and trade fair participation in London, England. The strong international competition from the United Kingdom (Prestel) and France (Antiope) was challenged by Canadian export successes in Germany (Siemens) and the United States (Times Mirror) and by the incorporation of the Telidon format in the AT&T videotex standard in 1981.

Avionics and Defence Electronics

Results in this sector for the year were impressive. Exports to the United States were \$345 million and to overseas countries \$87 million. In the last quarter alone, exports totalled over \$200 million, an indication of the upward trend.

Defence Industry Productivity Program (DIPP) expenditures for the year were \$33 million, which included completion of the Missile Inertial Guidance System program (\$5 million) and commencement of the Ring Laser Gyro project (\$8 million).

Industrial benefit activities continue and the division now has designated officers to the project offices of the CF-18 (Hornet) Program, the Canadian Frigate Program and the Radar Modernization Program. Considerably more activity is anticipated in this area in the future.

Among the many projects handled by the division during the year, one of the most promising is the Multi-Mode Matrix Flat Panel Solid State Displays. In October the producer, Litton Systems Canada, made a major marketing breakthrough with an initial production order from General Dynamics for 390 displays, valued at \$9.5 million, for the F-16 Aircraft.

The division also became involved in the development of electronic materials such as Cadmium/Mercury/Telluride and Gallium Arsenide, which will eventually lead to the availability in Canada of infrared detectors and GaAsFETs.

Electrical Energy

The division continued to work closely with the electrical industry to improve its competitiveness domestically and abroad. During the year the Enterprise Development Program was used for a number of new projects serving to develop unique high technology Canadian products, especially for specified generation, transmission and distribution equipment. In addition, the DIPP program provided support to subfractional motor development for military markets.

Work continued on the improvement of effective Canadian operating control of electrical manufacturing companies in Canada through application of departmental policies and close cooperation with the Foreign Investment Review Agency. A notable achievement in this regard was made in the transformer industry, where marketing control of major plants in another country was obtained by Federal Pioneer Limited of Toronto in connection with its purchase by the Reliance Electric Company of Cleveland.

The division continued to work closely with the industry to maximize Canadian content in domestic utility sales. Also, profiles and strategies were completed for the electric motor industrial control and variable speed control industries.

During the year the National Energy Program's goal of energy self-sufficiency was promoted in the electrical industry. Several substantial energy saving projects were initiated through the division's Industrial Energy Research and Development Program. Industrial and market assistance was also provided for alternative energy technologies, including low head hydro, mini-hydro, wind generators, hydrogen generation and application, and photovoltaic solar.

The division was also heavily involved in export market development work. The Department's electrical specialists participated in market identification missions to Australia and India. A Canadian industry mission to Australia identified new market opportunities for the Canadian electrical power sector. Later in the year Australian utility officials reciprocated with a visit to the Canadian companies. As a result, sales of electrical products to Australia are increasing. Other trade missions sponsored for the electrical sector included groups of buyers from Cuba, the United States and Iceland. A new and greatly expanded publication, **Electrical Canada**, was developed, defining Canadian products and companies for foreign buyers.

The developing countries, especially in Asia and South America, are undergoing massive development in electrical power. A large and increasing number of export opportunities were identified, with the trade commissioners in these countries.

The Electrical Energy Division continued to provide specialist consulting services, especially with respect to new departmental initiatives such as the Office of Industrial and Regional Benefits. During the year considerable work was done to define the planned and committed electrical megaprojects to the end of the century.

FOOD BRANCH (AGRICULTURE, FISHERIES AND FOOD PRODUCTS)

The food industry, represented by the Food Branch, is one of the largest and most diverse industries in Canada and is an important industrial sector in every province. Consequently, the Food Branch has been involved in a wide range of industrial and market development activities. Because export growth has assumed increased importance in recent years, as domestic demand eased for demographic reasons, export promotional activities continued to be emphasized. The branch sponsored 81 incoming buyers, 6 incoming trade missions, 5 outgoing missions and 18 trade promotions. In addition, financial assistance totalling \$7.2 million was provided to 13 food processors under the Enterprise Development Program.

The branch improved and modified its existing programs in international trade development. The program for Export Market Development (PEMD) Food was established in fall 1981, building upon the previous Section R of PEMD. PEMD Food offers a wide and flexible range of assistance for export development activities in the sector. It provides all the traditional activities of the various PEMD sections, as well as a special activities section which includes activities peculiar to the export development needs of the agricultural, fisheries and food sector. This section embraces a wide range of activities such as trial shipments, overseas representation and animal feeding trials. Projects supported to date include assistance for initial shipments of fish to Africa and Australia, assistance for special-purpose capital equipment which is necessary for export market development, as well as a large number of traditional types of activities for the sector such as market identification and participation at livestock shows abroad. Total project authorizations since PEMD Food was established are \$700 000.

Industrial development needs of the sector have been pursued with the assistance of the Enterprise Development Program. Activities have included product and process development, productivity enhancement and corporate restructuring. Innovation assistance has included diverse areas such as biomass and livestock embryo transplant. Under the present economic conditions, many companies are examining means of increasing productivity or restructuring operations with EDP assistance. The flight of the East Coast fisheries has resulted in approval of a number of loan guarantees to assist in restructuring of fish processing operations. In addition, the Food Branch has been active in assisting companies in the sector to establish and expand processing operations in areas designated under the Industry and Labour Adjustment Program.

These have included capital expansion and feasibility studies in the fisheries, meat packaging and beverage industries.

In addition to handling sector assistance applications and initiatives under the previously noted programs, the branch also assists in the evaluation of non-departmental programs of benefit to the industry, including the New Crop Development Fund and the Unsolicited Proposals Program.

Plant Products

Under the trade fairs and missions program, technical seed potato delegations were invited from Brazil, Morocco and Yugoslavia to demonstrate to them Canada's capability as a reliable supplier of quality seed. These three countries are potential new markets for Canadian seed potatoes.

Branch personnel also worked closely with the industry and the Trade Commissioners in Brazil in gaining access for Canadian yellow flesh potatoes. As a result, an import quota was established by the Brazilian authorities and the first commercial shipment of Canadian yellow flesh potatoes was made in January 1982.

The branch was actively involved in negotiations with the European Economic Community which led to reopening of the Italian market for Canadian seed potatoes. Discussions are continuing on establishing permanent access to the EEC market, based on mutually acceptable phytosanitary standards and certification. This has important implications for Canadian seed potato exports to a number of markets in the Mediterranean Basin.

Canada now has access to Japan for exports of fresh cherries. Imports from Canada had been banned by the Japanese to prevent entry of the codling moth, but the ban was dropped following the establishment of fumigation procedures acceptable to the Japanese, the visit to Canada by a Japanese phytosanitary official, and further bilateral discussions.

As a result of a Department-sponsored visit to Canada, a leading fruit trade magazine in the United Kingdom published a series of articles on Canadian quality apple production and export capability.

The division and the Canadian Embassy in Peking assisted the Alberta Wheat Pool in making its first sale of malting barley seed to China. The demand for beer is increasing dramatically among the younger Chinese population and if this first shipment of seed performs well under Chinese growing conditions it could open the door to substantial future sales.

A substantial first sale of flue-cured tobacco to the Arab Republic of Egypt was negotiated during the year. Groundwork for the sale was laid by an ITC-sponsored tobacco mission which visited Egypt several years ago. Demand for cigarette tobacco in Egypt is growing rapidly, both for domestic and export requirements. It is expected that Egypt will become a major continuing market for Canadian leaf tobacco.

Animal Products

Promotion of cattle, swine, semen and embryos continued at the same level as in previous years. Exhibits were held at the Salon international de l'agriculture in Paris, the Royal Highland Show in Edinburgh, the Royal Easter Show in Sydney, and the Curitiba Livestock Show in Brazil. A trade mission from the Dominican Republic concerning swine breeding stock was also completed. In addition, numerous incoming buyers from various parts of the world were introduced to Canadian livestock producers and exporters. Important sales of cattle and semen were achieved.

A dairy products technical mission to Europe was organized and led by the Department. This mission successfully explored dairy product development and marketing techniques. As a result, new dairy products will probably be developed and marketed in Canada, to the ultimate benefit of both the industry and the consumer.

As a result of departmental efforts, sales of high-quality beef were made to Japan and the EEC. Japan and the United States continued to be the major markets for pork, and the Department assisted and encouraged exporters to further develop these markets. Numerous trade enquiries for meat by-products, frozen poultry and poultry products, eggs and poultry breeding stock were received and disseminated to the trade.

Canadian raw furs were promoted by participation in the International Fur Fair in New York and by a mission to Hong Kong and Japan. Serious interest developed among Hong Kong buyers and substantial sales were later completed.

Grocery Products

The focus on markets for grocery products remained the same as for the previous year. There was a series of promotional events in Europe, the United States and Japan. An innovative concept was introduced by the Department's participation in Foodex in Tokyo, where five Canadian associations participated as umbrella organizations for their members. These were the Canadian Food Processors Association; the Association of Canadian Distillers; the Canadian Dairy Council; the

Canadian Meat Council, in association with the Canadian Pork Council and the Canadian Cattlemen; and the Canadian Fisheries Council, which incorporated the Canadian Association of Fishery Exporters and the British Columbia Seafood Exporters Association. Foodex attracted 100 000 trade visitors from Japan and South East Asia. In conjunction with this thrust, a mission of association executives visited Japan and Hong Kong for an on-site study of product marketing potential. This mission was led by the Director General of the Food Branch and included senior representatives from the Department of Agriculture and the Department of Fisheries and Oceans.

Canada also participated in two world-scale food shows, "Anuga '81" in Cologne, West Germany and the Food Marketing Institute in Dallas, Texas. These prestigious exhibitions were vehicles for more than 60 Canadian food processors to display their products and make contacts and sales in the international milieu.

Solo food and beverage fairs were held in the United States, targetted at cities in the near-border market -- Buffalo, Cleveland, Albany, Portland and Minneapolis. These events enabled processors in all provinces to exploit the potential in U.S. centres close at hand. These nearby markets can be well serviced by a large number of modest-sized Canadian processors.

As in past years, an industry specialist officer participated in all the meetings concerning International Commodity Agreements (cocoa, sugar, coffee).

Fisheries Products

In the past year the division has coordinated participation by the fishing industry in a number of missions and trade shows or promotions. These included a mission to Australia and New Zealand in November 1981; a selling mission to Egypt, Kuwait, Saudi Arabia and Israel in February 1982; and incoming buyers missions from South East Asia, Greece, Australia and New Zealand in September, 1981. Major shows in the past year have included an ITC-sponsored national exhibit at the National Restaurant-Hotel-Motel Show (NRA) in Chicago during May 16-20, 1981. Reaction to the exhibit was very favourable and led to new business opportunities. Fish companies were well represented at Department-sponsored national exhibits at the international food shows. Fifteen fish companies participated in "Anuga '81" in Germany and reported on-site sales of approximately \$15 million.

Consumer-oriented promotions over the past year included in-store promotions, one of them at the Seiyu Stores in Tokyo, and cooperative marketing

Efforts such as that undertaken in Chicago from February 1-13, 1982. The Chicago promotion was designed to motivate the retail, distribution and institutional trade, as well as the consumer, to buy more Canadian fish. Point-of-purchase materials, radio and newspaper ads, recipe lists and table toppers were developed. This promotion was done in lieu of Canadian participation in the North Atlantic Seafood Association promotion.

Although total exports of Canadian fish products increased from \$1.276 billion in 1980 to \$1.520 billion in 1981, the Canadian fishing industry is undergoing serious economic difficulties at present due to a cost-price squeeze caused by depressed markets, exchange rate disadvantages, increasing operating costs, technological obsolescence and inappropriate product mix. This situation is the subject of the recently established Task Force on the Atlantic Fisheries. The Fishery Products Division has been extensively involved in the international marketing elements of the task force. Because of the economic problems of the industry, the division has also participated actively in the analysis of loan applications to assist in industry restructuring, mainly under the Enterprise Development Program (EDP).

The division has been assisting the industry with financing in several market development initiatives under the Program for Export Market Development. A key example is the funding provided for a Newfoundland consortium to assist in the development of exports of mackerel to Nigeria, which would lead to increased processing of an underutilized Canadian species.

The division has also worked closely with the Department of Fisheries and Oceans in the past year in the negotiation of Bilateral Fisheries Agreements.

GRAIN MARKETING OFFICE

Expansion of activities in all sectors was achieved during the past fiscal year by the Grain Marketing Office. Exports of the major grains, oilseeds and products increased from \$5.2 billion in 1980 to \$5.9 billion in 1981.

Exports of major cereal grains and products in 1981 were:

- wheat - 15.5 million tonnes (\$3.7 billion);
- barley - 4.8 million tonnes (\$843 million);
- corn - 1.2 million tonnes (\$218 million);
- rye - 450 thousand tonnes (\$96 million);
- oats - 80 thousand tonnes (\$10 million);

- wheat flour - 533 thousand tonnes (\$219 million, estimated); and
- major oilseeds and products - 2.7 million tonnes (\$985 million) compared with 2.5 million tonnes in 1980.

The office sponsored two incoming missions and seven technical seminars in existing and potential import countries. Support information was provided to Canadian firms considering visits to potential markets. Major developments included a long-term agreement with the U.S.S.R. for the sale of a minimum of 25 million tonnes over the period from August 1981 to July 1986, negotiated by the Canadian Wheat Board, and a contract with Algeria for the purchase of canola oil. In the context of continuing cooperation, discussions were held with the major grain exporting countries to review developments in world trade.

Canola processing continued to increase through expansion of existing facilities and construction of new facilities. A new 600-tonne-a-day crushing facility in Manitoba will start crushing in October 1982 and a further 600-tonne-a-day facility in Eastern Canada is expected to commence crushing in early 1983. Oilseed crushing in 1981 totalled approximately 1.93 million tonnes of oil.

Producer advance payments under the Prairie Grain Advance Payments program reached a record \$344 million, almost tripling those of the previous year. Because of high interest rates and the record amount advanced, interest costs borne by the government totalled \$12.7 million, compared to \$2.7 million in the previous year.

The POS (Protein Oil and Starch) Pilot Plant Corporation was involved in developing a new processing technique which will greatly assist the oilseed processing industry in Canada by allowing processors to further refine their product at below-normal costs. The corporation received \$600 000 in operating assistance from the government.

The Canadian International Grains Institute offered a total of fifteen courses during the year, including eight programs for participants from overseas and seven domestic programs. All international programs are designed and conducted as part of Canada's market development plans for the grains and oilseeds industry. The Grains Institute is funded jointly by ITC and the Canadian Wheat Board.

The Grain Marketing Office sponsored incoming oilseed missions from Mexico and China, while technical seminars were sponsored in India, Pakistan, Venezuela, Chile, Romania, Yugoslavia and Japan. In conjunction with the seminars in

Japan, annual consultations between industry and government representatives of the two countries were held in Tokyo. A contract for the supply of up to 96 000 tonnes of canola oil, valued at \$66 million, was signed by the Algerian purchasing agency ONACO and the Canadian Commercial Corporation on behalf of three western canola crushers. The contract was facilitated by market promotion work, including technical seminars, conducted by the Grain Marketing Office.

The Western Grain Stabilization Administration reported that gross receipts from eligible Prairie grain sales for calendar year 1981 totalled more than \$6.2 billion, an increase of \$1.5 billion (or 32 percent) over gross receipts recorded in the previous year. Because of the increase in gross receipts, no payout from the fund was anticipated for 1981. The Department makes contributions to the fund on the basis of the value of gross receipts, in accordance with the terms of the Western Grain Stabilization Act.

Since December 1976, the Department has assisted the canola processing industry in Western Canada in adjusting to minimum compensatory rail freight rates for canola oil and meal. Funding is limited to \$3 million annually and expires March 31, 1983.

With assistance from the Program for Export Market Development (PEMD), technical information on canola oil and canola meal was updated and translated into Spanish, German, Chinese and Japanese. PEMD also funded the visit of a Canadian oil refining expert to Pakistan to provide technical assistance in the refining of canola oil for use as venasate.

MACHINERY BRANCH

The Machinery Branch provided an expanded program of financial support over the past year to firms undertaking new product development, innovation and export marketing. It increased the level of assistance to companies for the identification of new opportunities in domestic and export markets, and carried out industry-specific analysis and policy development. Deteriorating market conditions in several product sectors meant that branch resources were increasingly required to assist in the resolution of adjustment problems involving several major firms in the industry.

The Canadian machinery industry comprises approximately 2 000 companies with 142 000 employees producing a wide range of machinery and equipment for the resource processing, manufacturing and service industries. Industry production for

1981-82 is estimated at \$10.6 billion, including \$4.2 billion in export sales. The domestic market for machinery reached \$19.0 billion in 1981-82, with Canadian equipment firms supplying \$6.4 billion (34 percent) and imports accounting for \$12.3 billion (66 percent).

While industry production has been increasing at an average annual rate of 13 percent since 1970, production grew only marginally between 1980-81 and 1981-82, in the face of sharply reduced capital investment outlays by several user industries and depressed markets for farm machinery, construction equipment and forest harvesting equipment. The 1982-83 outlook is for further declines as the industry becomes more seriously affected by the continued general economic slump and runs out of backlogged orders which were built up as a result of strong business investment spending in the past three years.

A review of the major areas of Machinery Branch activities in 1981-82 follows.

Machinery Program Operation

The operation of the Machinery Program continued to be a major branch activity during the year. The program provides an industrial development incentive with the two-fold objective of:

- encouraging machinery manufacturers to derive maximum benefit from tariff provisions; and
- assisting machinery users to acquire advanced production equipment at the lowest possible cost through remission of duty on equipment available from production in Canada.

The Machinery Branch undertook an ongoing review of Canadian machinery manufacturing capability order to carry out commercial and technical assessments of duty remission applications from industry.

During the year, assessments were performed on 28 755 applications covering \$4.8 billion in imports. Remission of duty provided on equipment not available from Canadian production resulted in capital cost savings of \$400 million. This included duty remission on capital goods and production components pertaining to new manufacturing capabilities, installations of integrated production lines and automotive export orders which contributed to additional Canadian production of \$1 billion and an estimated 11 000 jobs in direct employment.

The provisions of the program were also instrumental in assisting 29 companies to begin production on 31 new machinery products previously supplied

tirely from imports. This new manufacturing activity represents \$185 million in annual production and close to 1 500 new jobs. New products in 1981-82 included "dry to dry" cleaning machines, pulp processing equipment, welding fume collectors and vibratory compacting rollers for use in road construction.

Industrial Benefits from Domestic Market Opportunities

During 1981 the branch was involved in an expanded program of work aimed at identifying market opportunities and developing the Canadian supply capability for machinery and equipment for a number of potential major domestic projects and programs. This activity included:

• direct support to the Industrial Benefits Committee to identify specific product opportunities, product gaps, supply bottlenecks, new equipment-related technologies and new investment required to ensure maximum participation by Canadian machinery manufacturers in major resource projects planned for the next few years;

• technical support to the Department of Supply and Services in evaluating all purchases of machinery and equipment exceeding \$2 million, to identify potential Canadian manufacturers to supply these requirements; and

• technical assistance and support to the management committee of the joint federal/provincial industry modernization program for the pulp and paper industry. During the year, branch sourcing assistance was provided in connection with the purchase of domestically produced pulp and paper equipment with a value of approximately \$150 million.

Sector Adjustment

The acceleration of recessionary forces during the last half of the year resulted in a worsening of adjustment problems for some firms, most notably in farm machinery and construction equipment. At the same time, the post-multilateral trade negotiations (MTN) trading environment has provided some new opportunities for product rationalization and specialization arrangements in several other sectors at both the firm and sector levels. Accordingly, branch resources were increasingly involved in helping to address these adjustment issues. These activities included:

• major briefings, consultations and monitoring activities in connection with federal government support to several machinery manufacturers

undergoing major reorganization and restructuring as a result of inadequate capitalization, as well as preparation of seven submissions to the Approval Board, involving \$18 million in loan guarantees which were subsequently approved under the Enterprise Development Program;

- initiatives toward rationalization and specialization arrangements for the production of products such as forestry equipment, slurry pumps, unit heaters, light stoper drills for mining, and industrial ovens; and
- technical and market assessments on nine projects, including new production opportunities in automotive transfer line equipment, welding and injection molding equipment, under the Community-Based Industrial Adjustment Program (CIAP), a component of ILAP, leading to approval of some \$1.4 million in direct funding assistance.

Innovation

Innovations in Canadian machinery design and development continued to be actively supported by the branch through the provision of departmental and other incentive programs. During the year, the branch evaluated 45 new cases under the Enterprise Development Program, approving 13 projects involving \$28.2 million in assistance. The approved projects are expected to result in increased sales of \$943 million and 2 612 additional jobs.

Analysis and Policy Development

Major activities in this area in 1981-82 included a full sector profile of the specialized mining equipment industry in Canada, an analysis aimed at identifying and outlining a set of strategic objectives to guide the Department's efforts in supporting the development of the industry in the 1980s, as well as several sector-specific briefings such as pulp and paper and oil and gas equipment.

Export Promotion

Machinery Branch maintains an active program of promotional and cooperative events aimed at assisting firms to take greater advantage of export markets. The 1981-82 promotional program included:

- approval of 211 applications under the Program for Export Market Development (PEMD) involving \$338 million in export potential;

- staffing 13 trade fairs and 12 trade missions and organizing industry participation in them (including a pulp and paper equipment mission to Australia, a heating equipment mission to France, a mining exhibition in Acapulco, an oil and gas exposition in Mexico, and a packaging machinery exhibition in Germany, resulting in on-site sales of \$13 million and projected sales of \$142 million); and
- participating in special trade and industrial cooperation missions and events including an energy mission to the EEC, nuclear seminars in Yugoslavia and Mexico, and agricultural equipment seminars in Australia.

OFFICE OF INDUSTRIAL AND REGIONAL BENEFITS

The Office of Industrial and Regional Benefits was created in August 1981 to help Canadian businesses and workers in all parts of the country take full advantage of the exceptional opportunities promised by major project activity in Canada over the next two decades. Since that date, the office has targeted some 34 major projects, with an aggregate value of \$103 billion, for priority attention. Procedures have been developed and launched to make these and other projects fully accessible to competitive Canadian manufacturers and service companies.

The office is the focal point for consultation and interaction with the private sector on industrial and regional benefits issues related to major projects. It works closely with provincial governments on industrial benefits matters, coordinates federal activities related to industrial benefits and, through the Canada Oil and Gas Lands Administration, advises the federal government with respect to the industrial benefits provisions of the Canada Oil and Gas Act.

The office consults with owners and sponsors of major projects to ensure that Canadian firms have "full and fair" access to major project opportunities. It encourages project sponsors to develop procurement policies in line with the government's industrial and regional benefits objectives and to put in place suitable organizational structures for carrying out these policies. It helps to identify areas where Canadian capability is strongest and most competitive, as well as areas of potential Canadian capability that merit development by sponsors.

The office organizes and presides over the meetings of, and supplies analytical and administrative support to the Committee on Megaproject Industrial and Regional Benefits.

This committee has representatives from provincial and territorial governments and other key federal departments, and serves as a wider forum for consultation with project sponsors. It was established in August 1981, replacing the former Advisory Committee on Industrial Benefits.

The committee held ten meetings with major project sponsors during the year. Projects discussed included oil and gas developments in the Beaufort Sea, the High Arctic and off the East Coast, as well as a hydroelectric scheme. These meetings, together with numerous, more informal contacts between the office and major project sponsors, opened up increased opportunities for Canadian suppliers. With the office's encouragement, a growing number of project sponsors began to develop procurement policies that give full consideration to the competitive capabilities of Canadian firms. The office also began a review of industrial benefits plans of companies negotiating exploration agreements with the Canada Oil and Gas Lands Administration.

The Major Projects Task Force published its report in June 1981. This is an independent group of 76 business and labour leaders established with the Department's assistance in 1978 to examine major project activity in Canada.

The Office of Industrial and Regional Benefits was responsible for studying the report's 50 recommendations and drafting a reply to them. The official government response will be made public in due course after consultation with provincial governments and the task force steering committee.

In October 1981, the office published an inventory of major projects that are under way or due to start in Canada before the end of the decade. It has started work on a strategy for developing products and firms to serve the market needs of oil and gas projects off the East Coast and on Crown lands.

OFFICE OF SERVICE INDUSTRIES

The Office of Service Industries is responsible for the Department's participation in the service sector of Canadian business. During 1981-82 the office placed increased emphasis on direct and advisory assistance to combat current economic problems. The activities covered wholesale and retail trade, merchandising services, construction, the renewable energy field, consulting firms, and the various modes of transportation and traffic services.

Wholesale and Retail

The Wholesale and Retail Division provided secretariat services to the Distributive Trades Consultative Committee. The committee was established in April 1981, with 21 representatives of the wholesale and retail trade. Its purpose was to analyze issues of significant concern to the distributive trades sector and make recommendations to government. The committee's final report, containing 71 recommendations, is to be submitted to the Department in April 1982.

The division increased its efforts to enhance world markets for Canadian distributors. In this regard, it carried out the Department's role as sponsor for the Sixth General Assembly of the World Federation of Proprietary Medicine Manufacturers, held in Canada in October 1981 and attended by some 26 nations. Through the Program for Export Market Development (PEMD-S), the division arranged for an international presentation and meetings to improve world awareness of Canadian publishing. The division also undertook a study to develop an export market strategy for cooperative organizations. Initiatives were undertaken on the development of a wholesale exporters directory, with refinements planned for 1982-83.

Technical presentations on business management were supported by the division, with reference to retail pharmacy operations and sporting goods store development. Work continued on developing an improved productivity measurement system for retailing, with a number of retailers participating in a test of a newly developed system.

Recent developments affecting the use of new technology in distribution were closely followed. A study by a Canadian university of the marketing implications of electronic point-of-sale technology was supported through the Technical Innovation Studies Program.

The division improved its ability and increased its activity to provide assistance to private firms and persons requiring information on Canadian distribution channels and contacts with specific types of distribution firms.

Franchising Services

The division represented the Canadian Government at the annual meeting of the International Franchise Association, and continued to develop the close ties with the Japanese Franchise Association which resulted from the highly successful franchising trade mission to Japan in March 1981.

Strong interest in the Pacific Rim markets resulted in a franchising trade mission to Australia and New Zealand in March 1982. Initial sales indicate that this will be the most successful franchise trade mission to date. The branch has developed a substantial knowledge base to aid Canadian franchisers in their export efforts in this area.

The division began the development of a manual for domestic and foreign licensing, in cooperation with the Licensing Opportunities Section of the Department. A pilot seminar was planned for the beginning of the 1982-83 fiscal year and initial contacts were made with provincial industry departments.

The division contributed to the Distribution Trades Consultative Committee at the secretariat level.

Publication during the year of **Canada's Trade Challenge**, the report of the Parliamentary Committee on a National Trading Corporation, proved to be very important to the trading house sector. The division responded to the recommendation of the Parliamentary Committee that more effort be expended to support the private sector in this area. This included a trading house mission to Australia to improve representation in that country; organizing a seminar in Ottawa for 300 business persons, senior representatives of government and leaders of private industry; and publishing a directory, **Trading House**, and distributing it to business groups across the country to help focus attention on the strength of the sector and the immense dollar value that has resulted. Estimates show that trading houses transacted \$11 billion of business in 1980.

CONSTRUCTION AND CONSULTING SERVICES BRANCH

Construction

The Construction Division continued to direct its efforts throughout the year to increasing the productivity, efficiency and export market performance of the construction, real estate development and renewable energy industries.

Highlights of the division's activities were as follows:

- seminars on materials handling in Vancouver, Calgary, Saskatoon, Saint John and Halifax, aimed at improving job-site productivity and developing new products and processes for use in construction, through the Enterprise Development Program;

- completion of a study of construction in northern Canada (above a latitude of 60 degrees) for consideration by the Construction Industry Development Council as part of the Council's overall study of construction in Canada in the 1980s;
- revision of the **Construction Industry Exporters Directory** and distribution to Canadian trade posts abroad and to interested firms in Canada and other countries;
- a trade mission of Canadian construction firms to Peru, Ecuador and Colombia, with positive results including an immediate contract for one firm, a promising outlook for other participants, and at least \$22 million in contracts anticipated in the near future;
- completion of a study of export opportunities arising from the activities of Canadian real estate developers in the U.S. market; and
- provision of the departmental focal point for renewable energy systems and energy conservation in buildings. Activities included representation on industry and interdepartmental committees; participation in the annual meetings of the Solar Energy Society of Canada Inc. and the Canadian Solar Industries Association; organization of a trade mission to California; coordination of exhibits at the UN Conference on Renewable Energy in Nairobi, Kenya and the International Solar Energy Symposium in Brighton, England; and the publication of a brochure on the solar energy industry in Canada, along with a market study on export of solar equipment to the United States and the Caribbean.

Consulting Services

The Consulting Services Division continued to assist industry in achieving its growth potential, overcoming constraints and promoting increased export sales of Canadian consulting services.

During the year, the division carried out an active liaison program with consulting associations, particularly with the Association of Consulting Engineers of Canada, the Royal Architectural Institute of Canada, the Canadian Consulting Agrologists Association and the Canadian Association of Hydrographic and Ocean Surveying Industries.

The Consultative Committee on the Canadian Consulting Engineering Industry, comprising 15 senior executives from industry and observers from provincial governments, established task

forces to address specific aspects of the industry.

The division participated in a number of industry development and trade development seminars. An international symposium on computer-aided building design (CABD) was organized in cooperation with the Centre for Building Studies, Concordia University in Montreal, to develop an awareness of recent international developments in CABD and of the potential benefits of this new technology by Canada's construction industry.

The division held joint government industry meetings with the World Bank and Inter-American Development Bank in Washington and with the UN Development Program in New York to provide support to the export activities of Canadian consultants.

The division carried out a fact-finding mission to Hong Kong, Indonesia and Singapore, focussing on architectural, management and computer software consulting, and reviewing the current potential for exports and the approaches best suited to penetrating these markets.

A heavy commitment of the division's activities related to PEMD delivery and the reporting of foreign market opportunities to consultants. During the year, the division dealt with over 22 PEMD applications and brought nearly 500 project notices to the attention of consultants.

TRANSPORTATION SERVICES BRANCH

International transportation developments and initiatives of multilateral organizations continued to occupy the branch's attention during the year. All divisions worked closely with individual shippers, shipping companies and industry associations in resolving specific domestic and international transportation problems and in identifying and pursuing new market opportunities. Significant contributions were made to policy deliberations affecting trade, tourism and the transportation service industries. Specific achievements and areas of work by the division follow.

Maritime Transport

The division participated in studies by the UN Conference on Trade and Development and the OECD of international shipping initiatives affecting Canadian trade, including cargo-sharing in liner and bulk trades, conditions of ship registration phasing-out of flags-of-convenience and the modernization of marine insurance contracts.

Air Transport

The interests of business travellers, shippers and the tourism industry continued to be the focus of the division's contribution to a number of air policy issues, including Canada-U.S. air services negotiations, domestic air carrier policy, Canada-Singapore and Canada-India air services markets, the Montreal Airports Systems, STOL services in the Toronto-Montreal-Ottawa triangle, the sale of air and the review of the international civil aviation policy. As part of the review, a background paper was prepared on the importance of air cargo within the international air services system.

Studies were undertaken to assess the need for and possible timing of direct air services between Canada and selected countries. The approach taken assesses air services potential on present services, trade and tourism factors, current origin and destination traffic and historical growth rates.

Some progress was made in improving the collection and reporting of air cargo statistics, although this will require ongoing activity in the next fiscal year.

Traffic Services

Contributions were made to the formulation and resolution of a number of policies from the viewpoint of Canadian shippers and the industrial development of the traffic services industry. These included the establishment of departmental positions on the resolution of the Crow's Nest site issue; the U.S. valuation for duty of inland transportation costs; new federal regulations for the transportation of dangerous goods; and studies relating to the likely trade and industry ramifications of Canada's ratification of the UN Convention on International Multimodal Transport.

Directory of Ocean Shipping Services has been maintained and made available to shippers. The directory describes 125 ocean shipping services to export markets from Canadian ports.

Through participation in trade meetings, the branch has acted to resolve a number of transportation-related issues perceived to be impediments to Canadian trade. In addition, a number of product and commodity transportation studies were completed related to specific trades.

In the field of trade facilitation, the branch reviewed the progress and achievements of the Canadian Organization for the Simplification of Trade Procedures (COSTPRO) and made recommendations regarding the future form of government

assistance to this organization. A \$1.6 million trade facilitation program has since been announced by the Minister of State for Trade. A key element of this program is the transfer of COSTPRO to the private sector under an agreement with the Canadian Export Association to provide administrative and financial supervisory services to the organization.

During 1981-82 COSTPRO worked closely with the National Committee on International Trade Documentation in the United States and was successful in eliminating a U.S. Special Customs Invoice, which is estimated to save the Canadian export community up to \$20 million annually.

COSTPRO engaged seven firms in the field trials of its Canadian Trade Information System, with assistance from the Department. Preliminary results indicate the following benefits: a 30 percent decrease in the person-hours required for document preparation, decreased printing costs, and increased productivity of the office staff.

RESOURCE INDUSTRIES BRANCH

Iron and Steel

The Iron and Steel Division received numerous requests for assistance from the steel mills, the fabricating industry, manufacturers of steel products, individuals, private associations and institutes, and various provincial, federal and international agencies, as a result of the lower demand for steel in 1981-82.

The division, in cooperation with the Trade Commissioner Service, selected a large number of trade shows and trade fairs around the world in which they encouraged manufacturers of steel buildings to participate in order to penetrate export markets. The division initiated an outgoing mission to enable Canadian university professors to visit research institutes and steel plants in the Federal Republic of Germany in an interchange research program undertaken between Canada and the European Economic Community.

Also on the international scene, the Chief of the Iron and Steel Division was elected chairman of the OECD Steel Committee Working Party and attended several committee meetings in connection with the crisis in world steel markets. The division represented Canada at the annual meeting of the Steel Committee of the Economic Commission for Europe in fall 1981 in Geneva. Throughout 1981-82 consultations were held with U.S. government officials and with the Steel Industry

Advisory Group concerning the U.S. trigger price preclearance program and other matters of mutual concern.

Within Canada, meetings of the Steel Industry Advisory Group were held in conjunction with meetings with government officials from various other government departments and agencies at irregular intervals throughout the year. Several of these meetings were related to problems caused by low-priced steel imports.

Non-Ferrous Metals

Progress on the formation of an Intergovernmental Discussion Group on Nickel was relatively slow, although meetings were held to substantially formalize a statistical questionnaire and agree on the content of an information background paper. It was further agreed that Canada and Australia would approach some 30 significant nickel producing and/or consuming countries during 1982 to determine their interest in participating in such an organization and completing the questionnaire on a regular basis. Preparatory plans for the program were formulated.

The division provided departmental representation on the Interdepartmental Committee on the Law of the Sea, following the developments and participating in the formulation of recommendations related to the negotiations.

The division led a Canadian delegation at meetings of the International Lead and Zinc Study Group to discuss the worldwide market situation for these metals.

Metal Fabricating Industries

During 1981-82, the division was called upon by groups of metal fabricating companies for assistance in dealing with a variety of trade-related difficulties. In the absence of formal industry associations, the division assisted in organizing producer task forces to deal with such problems as dumping, subsidized imports, changes to the General Preferential Tariff and non-tariff barriers raised by our trading partners.

In November 1981, a Canadian iron foundry technology mission made up of eight representatives from different sectors of the Canadian industry, led by a division officer, visited modern foundries in France, Germany, Belgium and the United Kingdom to seek out advanced technological developments which might be applicable in Canadian iron foundries. Members examined several developments of interest in instrumentation, quality control and computerized production.

The capabilities of the Canadian ferrous forging industry were outlined in a report published by the division. The report, produced in cooperation with the industry, represented the first time that information on the sector had been made publicly available. A directory of the Canadian ferrous foundry industry was nearing completion and will be distributed in 1982.

Export market surveys were undertaken for prefabricated greenhouses, chain-link fence, gas cylinders and various architectural metal products, in conjunction with Canadian manufacturers and our trade posts. Import analyses of roller chain and aluminum powder and granules were completed with a view to assessing the opportunities for Canadian producers in the domestic market.

Industrial Minerals

The Canadian coal industry, assisted by the market development efforts of the division, had outstanding success in market diversification in 1981. Exports were made to 18 countries, including seven in Europe, at a total value of \$1.03 billion. Japan, our largest market, accounts for 66 percent of Canadian coal exports, but new markets in Europe and Latin America are being opened each year. At present our major coal export is coking coal for the steel industry, but considerable effort has been made to develop thermal coal markets. At present 95 percent of exports are by British Columbia and Alberta companies.

Coal export development efforts were sustained and diversified through incoming trade missions and visits of coal industry representatives from many countries including Japan, the Philippines, Portugal, Denmark and Egypt.

Continuing liaison was maintained with coal mining companies, provincial governments, Canadian embassies and federal departments on current sales prospects for coal. Consultations were held with federal departments on proposals for federal expenditures in connection with the development of the northeast British Columbia and Cape Breton coalfields.

The heightened asbestos controversy in Europe and finalizing of preparations for the World Symposium on Asbestos, to be held in Montreal in May 1982, made particularly heavy demands on the division's time and resources in support of activities in this industry sector. Under the auspices of the Canada/ECE Industrial Cooperation Agreement, the Government of Canada, the Government of Quebec and the Economic Commission for Europe took the initiative of organizing the symposium. This meeting is intended to yield an exhaustive evaluation

tion of the various aspects of asbestos use, to better equip the international community, and to determine the opportunities of reconciling economic and commercial interests with social concerns, including the quality of life.

umerous high-level technical discussions were held with those governments having an interest in the asbestos question, including France, Sweden and the Federal Republic of Germany. In addition, ITC cooperated with the Department of National Health and Welfare in arranging for a mission of Canadian scientists to initiate discussions with West Germany to exchange information and investigate possible joint research on asbestos and health. Consultants were engaged to review the available scientific evidence related to asbestos and health issues.

Industry and Market Analysis

The division is responsible for the coordination of cooperative activities of the Canadian metals and minerals industries with those of the European communities (France, West Germany, Sweden), Japan and Australia.

The secretariat of the Federal-Provincial Working Group on Asbestos is located in the division. This group produced a position paper on asbestos regulation which was approved by all federal departments interested in the matter and circulated to all provinces for approval. A strategy for the protection of Canada's export markets for asbestos was developed and implemented.

An input-output impact study of the metals and minerals industries was completed and work was carried out on the development of a federal income tax and an Ontario income and mining tax model for the mineral industry.

In the context of the Department's review of the issue of metals and minerals processing in Canada, two preliminary background papers were prepared: **Metals and Minerals Processing: A Background Report** and **Canada's Non-Ferrous Primary Metal Industries**. Informal discussions were also initiated with some provinces and members of industry to obtain initial views on the major thrusts and conclusions of this work.

Primary Wood Products

The Cooperative Overseas Market Development program, which is funded and administered by ITC, the British Columbia Ministry of Industry and Small Business Development, and the Council of Forest Industries of British Columbia, is directed toward expansion of offshore markets for Canadian

softwood lumber, plywood, shingles and shakes. The Primary Wood Products Division administers the program jointly with the other two participants. Overseas exports from Canada increased from \$245 million in 1970, prior to the first phase of the program, to \$1.4 billion in 1980, dropping to \$1.1 billion in 1981. The federal share of 1981-82 program costs totalled \$1.5 million.

A major issue confronting the Canadian forest industry was the investigation by the U.S. International Trade Commission of Canadian softwood lumber exports to the United States. The division worked closely with other concerned federal and provincial government departments and industry groups to assist the industry in responding to this issue.

The division continued to coordinate the Canadian response to the EEC regulation which requires that each shipment of softwood lumber to the EEC be accompanied by a phytosanitary certificate from Agriculture Canada certifying the absence of bark beetles. The division worked closely with the nine industry associations concerned and with other government departments, to achieve a compromise allowing a private sector mill inspector to certify that a particular shipment has been produced from debarked logs and conforms to the plant health requirements of the importing country. This system has been accepted by all EEC member states except France, Italy and Holland. Negotiations on this matter are continuing.

A significant number of carefully selected trade promotion activities were organized and carried out during the year. Seminars were organized in Paris, Rome and Brussels to introduce potential users to the advantages provided by Canadian building systems and wood products. An incoming mission of lumber buyers from California met with lumber producers and associations in the B.C. interior. A self-supporting mission representing an association of Italian wood products users visited Canadian producers, building sites, and manufacturing operations. Division officers participated in seminars in Boston, Chicago and Detroit, designed to promote increased use of Canadian wood products.

Due to the severe downturn in markets for wood products, the division received a large number of inquiries and applications from the wood products industry for assistance under the Enterprise Development Program (EDP). The division also provided a significant input to the Department of Regional Economic Expansion in its review of applications under the Regional Development Incentives Act. A large number of applications under PEMD, ILAP and other assistance programs were also processed.

The Canadian paper for the annual meeting of the Timber Committee of the Economic Commission for Europe was prepared and presented, and support was provided to economic or industrial cooperation committees with Japan, Cuba, Algeria and Norway.

Manufactured Wood Products

The decline in Canadian residential construction prompted a number of companies to investigate market opportunities in the United States and overseas. Increased attention to export trade development by the division has reflected the increased desire by Canadian firms to establish a broader market base. This has resulted in greater emphasis on trade fair activity, trade-related missions and selected market studies. Government and company participation in trade shows such as "Batimat" in Paris and the Woodworking, Machinery and Component Show in Los Angeles are examples, along with incoming technical timber frame housing missions. Studies of the potential for manufactured wood products in the southeast United States, the Michigan area and southern California have initiated serious market investigations and subsequent product sales by Canadian manufacturers.

These efforts helped to raise Canadian exports of manufactured wood products to a record total of \$454 million in 1981, accelerating the growth which has persisted since the 1970s. While the United States continued to be the dominant market, expanded trade was experienced in Western Europe, Japan and the Middle East despite a worldwide slowdown in housing activity and some strengthening of the Canadian dollar against other major trading currencies.

The division's aim has been to take advantage of the rapidly developing worldwide concern over energy conservation and the expanding worldwide shortage of wood. This has led to increased interest in the Canadian timber-frame residential construction technique and the Canadian supply of a wide range of wood products in a number of key markets. Reflecting these developments, building code authorities, architects, builders, financial and insurance authorities, and specifiers from Germany, Belgium, Italy and Japan were brought to Canada to study the timber-frame technique and explore potential sources of product supply. Additional activities undertaken by the division during the year to reinforce these efforts were the biannual Canada-Japan Housing Committee meeting, the Canada-European Communities Forest Products Working Group and program support activities aimed at alleviating some of the current financial difficulties of the sector and providing innovation support to penetrate the expanding market opportunities. The division

worked with several industry trade associations and individual company contacts to bolster company efforts in developing outside market potential.

Pulp and Paper

Implementation of the Pulp and Paper Modernization Program, announced in 1979, continued in 1981-82. This joint federal-provincial program provides investment incentives for primary producers to modernize their production facilities. Agreements to participate have been negotiated with Quebec, Ontario, New Brunswick, Nova Scotia and Newfoundland. The Pulp and Paper Division has participated in the management of this program through analysis, recommendations and follow-up on individual company proposals. The division's technical and marketing expertise has also been called upon for study and implementation of new major industrial development projects across Canada, in both the primary and converting sectors of the pulp and paper industry.

The division continued to serve on international industrial development committees designed to promote the exchange of technical expertise and to foster trade and investment between nations. The present list of committees encompasses the EEC, Japan, Cuba, the U.S.S.R., the OECD, and the multinational Customs Cooperation Council.

There is increased emphasis on converted products and packaging materials, particularly on developing exports of more finished products. Market studies are currently in progress to identify specific export opportunities for packaging materials. Industry counselling to associations and on an individual company basis is being expanded to encourage exports, to provide export assistance, to identify market opportunities and to respond to product sourcing requests received from overseas posts.

SURFACE TRANSPORTATION BRANCH

The Surface Transportation Branch undertook a number of important initiatives aimed at easing the difficulties experienced in the industry during 1981-82, capitalizing on marketing opportunities, assisting in restructuring, promoting technological adaptation and ensuring long-term viability and growth on a worldwide competitive basis.

The broad program of activities of the branch included formal international discussions related to this most important sector of the economy and new initiatives under federal assistance programs to improve the position of Canadian producers in

both domestic and export markets. The branch was also involved in negotiating agreements with companies to enhance employment and production activities in Canada, participating in major international trade shows, and organizing trade missions to many potential markets of the world.

Automotive

The North American automotive industry continued to encounter serious difficulties through the fiscal year. The industry has been deeply affected by the current economic downturn (particularly in the key U.S. market), as well as by major technological changes and increasing international competition.

Formal consultations with the U.S. government under the Auto Pact, begun in April 1980, continued into 1981 with a series of meetings of senior officials, with the Canadian delegation led by officials of ITC. The major focus of these consultations has been the overall performance of the North American industry within the worldwide context and possible measures to improve the situation. A number of Canadian concerns were also raised regarding Canada's trade deficit in auto parts and the levels of investment and R&D within the Canadian industry.

Department officials also headed the Canadian delegation in discussions with Japan which resulted in a June 1981 announcement by the Japanese Government to limit passenger car exports to Canada to 174 213 units during the April 1981 to March 1982 period. This represented a rollback of six percent compared to fiscal 1980-81 exports. Further discussions with the Japanese were also initiated seeking appropriate Japanese action for the period after March 31, 1982.

Branch officials continued to work closely with domestic vehicle manufacturers to assist them in their restructuring efforts. As provided in a January 1981 agreement involving limited adjustments to Ford's Auto Pact requirements, the company added a second shift at its Oakville Assembly Plant, employing an additional 1 200 workers. Under the agreement, this plant is to be converted to produce new compact, front-wheel-drive cars in 1983. Close consultation was also maintained with Chrysler Canada as the company began to implement its new Canadian production and investment program, as provided in a February 1981 agreement making available up to \$200 million in federal loan guarantees to support the company's restructuring. This included the transfer of all Chrysler's remaining rear-wheel-drive car production to its Windsor assembly plant and initiation of a major investment program aimed at replacing this activity with production on a product-mandate

basis of the new T-115 front-wheel-drive van-wagon in 1983.

Department representatives negotiated a federal government agreement with Volkswagen Canada in October 1981 for the company to establish a \$150 million auto parts plant at Barrie, Ontario, and to substantially increase auto parts purchases from independent Canadian suppliers in return for duty-free access to the Canadian market for cars and light trucks. Under the agreement, Volkswagen will achieve a level of Canadian value-added rising to 85 percent of the company's vehicle sales in Canada. The arrangement will create approximately 1 500 direct jobs, 500 at the Volkswagen plant in Barrie and approximately 1 000 in the independent parts sector.

To assist adjustment in the automotive sector, the Minister of Industry, Trade and Commerce announced in January 1982 that a new \$25 million fund would be made available over the next two fiscal years to the independent automotive parts sector through a designation under the Industry-Specific Restructuring Program (ISRP). The major aim of the program, which forms part of ILAP, is to provide financial assistance to small and medium-sized firms wishing to undertake viable capital projects which would otherwise not be carried out.

The branch also continued its active promotion of export opportunities for Canadian auto parts and vehicle manufacturers. Intensive export efforts were made by promoting joint ventures, sponsoring trade missions and participating in trade fairs in Europe, Australia, the United States, Japan and South America. Industrial and export development continued to be encouraged through Department programs such as EDP, DIPP and PEMD. Export efforts in the auto parts sector were also supported by the automotive components duty remission program operated by the branch, with exports under the program reaching a level of over \$100 million annually.

Rail Systems

As the railway supply sector also suffered from a severe decline in domestic demand, the Department placed emphasis on export marketing. Significant initiatives were encouraged through PEMD and in outgoing and incoming trade missions in Latin America, Africa and the Asian subcontinent, resulting in Canadian firms being shortlisted for \$200 million worth of locomotives and technical assistance in Algeria and \$431 million worth of locomotives, rails and rolling stock in Nigeria. With the assistance of the Export Development Corporation and the Canadian International Development Agency, sales orders were achieved in Cameroon (\$14 million), Tunisia (\$30 million),

Zimbabwe (\$29 million), Egypt (\$155 million) and Indonesia (\$100 million). Prospects continue to be encouraged elsewhere, with departmental officials working closely with CIDA and EDC regarding these projects.

The division organized and sponsored the Department's membership in the Pan American Railway Congress Association (PARCA) and the Association of American Railroads to promote industrial and technical cooperation and R&D exchanges. A mission of 50 Canadian firms attended the fifteenth PARCA conference in Mexico in October 1981. Strong relationships were also initiated with the Union of African Railways (UAR), comprising 32 member countries, to promote Canadian products, standards and expertise.

The major R&D project in the railway sector continued to be the Bombardier locomotive development. The objective of this seven-year, \$54 million project of the Enterprise Development Program is to strengthen Bombardier's product position in the market and increase its R&D capability. A \$350 000 EDP project to develop a high-speed ballast regulator was also completed successfully and sales of production units followed. An earlier project of the Department's Program for Advancement of Industrial Technology (PAIT), to develop the first Canadian fully-hydraulic rail-mounted cranes for sale to domestic railways, had its first success in export sales in 1981, with a \$1.2 million sale in the United States. The high-speed tamper project (\$3.5 million), which was initiated with support under the Department's PAIT program, reached its second year of prototype testing and domestic railways are hopeful of its contribution to the productivity of this aspect of track maintenance. Other projects being considered for Department support under the EDP program included development of a high-speed undercutter/cleaner and transcontinental bilevel passenger coaches.

The division continued to work with industry and other departments on railway electrification technology. Early initiatives focussed on construction of an electrified railway line for the British Columbia Railway.

Urban Transit

Canadian urban transit manufacturers continued to achieve success in both domestic and export markets, with a sales level of approximately \$1.8 billion for the year. The branch continued its active role in export promotion within the sector, sponsoring trade fairs, missions and other activities including sponsorship of a major exhibition at the American Public Transit Association in Chicago in October 1981. Approximately

\$350 000 in assistance under PEMD was provided to exporters, and industrial development was supported through the EDP, including assistance to Ontario Bus Industries for development of a downsized transit bus.

Marketing assistance provided by the branch was an important factor in a number of significant industry export successes. Major orders were secured for both subway cars and transit buses in the U.S. market. In addition, federal export financing assistance was provided in April 1981 for a Bombardier contract for a \$180 million subway car order to be supplied to Mexico City. This was the first major non-U.S. export sale of Canadian transit system technology.

The Department was also actively involved in discussions leading to a federal government contribution in March 1982 of \$60 million in support of industrial and market development objectives for the new high-technology intermediate-capacity transit system developed by the Urban Transit Development Corporation and sold to the City of Vancouver. This system will be one of the leading exhibits at "Expo 86" in Vancouver and a showcase for Canadian technological capabilities in the urban transit field.

TECHNOLOGY BRANCH

During the year, contributions were made to one Industrial Research Institute (IRI), seven Centre of Advanced Technology (CATs) and one Industrial Research Association (IRA) under the Department's Institutional Assistance Program. Under this program, universities, provincial research organizations and industrial groups are encouraged to establish a capability to undertake relevant research and development projects for industry and provide technical advice and services. Seven IRIs, five CATs and three IRAs established across the country under the program in earlier years are now self-sustaining through income from the sale of services to industrial firms and other clients. In 1981-82 two new CATs were established: the Canadian Institute of Fisheries Halifax at the Nova Scotia Technical University and the Canadian Centre for Advanced Instrumentation at the Saskatchewan Research Council.

Financial assistance was also provided by the Department to two innovation centres which were officially opened last year. One is affiliated with the University of Waterloo and the other with École polytechnique de Montréal. These centres evaluate inventions and assist in the commercialization of new products and the establishment of new technology-based companies.

Assistance continued for four Centres of International Business Studies at Canadian universities and for the Management Advisory Institutes at the University of Alberta and Laval University. Under the Technological Innovation Studies Program, awards were made to one independent and nine university researchers to carry out studies in such areas as strategic planning for technological innovation in small business and policies to assist the computer-aided learning industry. The results of these research projects are used by the Department to develop policies to promote industrial innovation in Canada and to familiarize university staff with industrial needs and opportunities. These and other similar assistance programs administered by the Department were integrated into the Institutional Assistance program.

An active program was again maintained during the year to increase the awareness and use of computer-aided design/computer-aided manufacturing (CAD/CAM) in Canadian industry. In addition to presentations at many seminars and conferences, a monthly newsletter was issued on the subject to over 1 800 readers and a new publication containing a series of articles on CAD/CAM technology and applications was distributed to over 4 000 technical and management personnel in industry. Preparation of a new directory of Canadian companies providing CAD/CAM products and services was also completed.

Studies continued on identifying industrial development opportunities arising out of recent discoveries in biotechnology and the potential need for a departmental strategy and program to assist industry in developing a competitive capability in this field.

Contributions were made to interdepartmental studies on the proposed expansion of the federal government's space program. Space-related activities included a joint study with the Department of Communications on the merits of continuing Canadian participation in the European Space Agency's Large Satellite (L-SAT) program and the development of cost/benefit information relating to the consideration of the next phases of the M-SAT and RADARSAT programs.

Work was completed to expand the field of application of the Industry Energy Research and Development Program, which is designed to encourage industry to develop innovative energy-conserving processes and technologies. Twelve industrial projects were approved under this program, compared with five annually in the preceding three years.

Work continued on the implementation of the GATT Agreement on Technical Barriers to Trade, which Canada signed in 1979. A directive outlining the procedures and practices to be followed by federal government departments and agencies in preparing, adopting or applying technical regulations, standards and certification systems to comply with the Agreement, was approved by Treasury Board and distributed to deputy heads of departments and heads of agencies. The contract with the Standards Council of Canada was renewed for the operation of an Enquiry Point to provide information on Canadian standards, technical regulations and certification systems, as required under the Agreement.

A detailed study was carried out on the possible future roles of Canadian Patents and Development Limited in the transfer of technology to industry.

TEXTILES AND CONSUMER PRODUCTS BRANCH

As part of a new government policy, the Textiles and Consumer Products Branch developed a \$267 million adjustment program to foster the development of the clothing, textiles, footwear and tanning industries and to assist those communities and employees most affected by international competition. The new policy provided for continuation of the clothing and textile bilateral restraints for an additional five-year period.

The branch was successful in enlisting industry cooperation and participation in federally-sponsored trade shows in major world markets, and arranged incoming and outgoing trade missions to emphasize the advantages offered by the purchase of Canadian products.

Performance over 1981-82 was varied. The textiles industry started the year on a comparatively strong note, but conditions changed drastically mid-year and a downward trend was experienced during the last six months. The clothing industry followed the same pattern and after a reasonably good start, conditions deteriorated rapidly during the latter half of the year.

Total furniture shipments, however, showed a marked increase during the year, and the leisure industries reported that conditions remained stable.

Furniture and Footwear

Furniture. Total furniture shipments in 1981 exceeded \$2.6 billion, an increase of 16 percent over the previous year.

Assistance provided under the Enterprise Development Program enabled a number of smaller manufacturers to undertake restructuring, productivity improvement and design projects.

With assistance from the Department, the business furniture sector participated in solo shows in Columbus, Boston, Seattle and Atlanta. Exports of office furniture in 1981-82 were \$150 million, or 30 percent of factory shipments.

Residential furniture manufacturers continued to participate in the Southern Furniture Market at High Point, North Carolina. In addition, the Department assisted firms to increase sales in the greater New York City area through a series of solo shows, incoming buyer visits and outgoing sales visits to that area.

Footwear and Leather. The Canadian footwear industry produced 43.4 million pairs of footwear valued at \$830 million in 1981. This was an improvement of 2.6 percent in pairage and 15.8 percent in value over 1980.

The industry also exported \$68.2 million, an increase of 3.3 percent over 1980. With the assistance of export development programs, the industry succeeded in diversifying its export markets to areas other than the United States, which remained its major customer. Exports to the European Economic Community amounted to \$11.7 million in 1981.

Early in 1981 the Anti-Dumping Tribunal concluded in its report on the footwear industry that although the Canadian industry is able to compete with imports from the developed countries, it would be seriously injured by imports from low-cost countries, in the absence of special measures of protection. These include Hong Kong, Brazil, Taiwan, India and South Korea, from which most non-leather footwear imports originate. The government imposed a quota on non-leather footwear imports, including canvas, effective December 1, 1981, with an interim annual ceiling of approximately 35.6 million pairs based on available data.

Along with the special protection measures, the government's footwear and tanning industries policy, announced in November 1981, provides financial assistance for manufacturers to restructure and modernize and provides worker and community assistance. Implementation of these assistance measures has been made the responsi-

bility of the Canadian Industrial Renewal Board (CIRB). The division assists CIRB in the delivery of the industry sector program by providing detailed subsector and individual firm assessments and technical advice.

In the leather tanning sector, the Canadian industry's production in 1981 increased by 5.8 percent over the previous year to an estimated 1.2 million m², due largely to increased demand in the footwear industry.

Musical Instruments

For the second time, the Department sponsored participation at "Musikmesse", the international trade fair in Frankfurt, Germany. Ten Canadian manufacturers of musical instruments, sound equipment and related accessories exhibited in February 1982. On-site sales amounted to \$385,000 and follow-up business is expected to exceed \$4.5 million.

Textile

The announcement of a new policy for the textile and clothing sectors has been well received by the industry. Highlights of this revised policy include renegotiation of import restraint arrangements with 17 low-cost suppliers for a five-year period and the establishment of the Canadian Industrial Renewal Board (CIRB) with a budget of \$250 million to assist the textile and clothing industries as well as the relevant communities.

Business conditions changed drastically in the textile industry during the second half of 1981 and recessionary forces caused the downward trend of industry activity, employment and profits to continue. Some subsectors, such as carpet and wool fabric, were more seriously affected than others.

Imports of textiles increased by 14 percent in dollar terms in 1981, with the import share of the Canadian market remaining stable at 27 percent. Canadian export activity reached \$473.9 million, an increase of 12 percent over 1980-81. The division recruited exhibitors and assisted in the organization of three apparel fabric shows and a carpet show. These exhibitions abroad have contributed to the success of the industry in terms of exports in Europe, Japan and Central America.

Clothing

Conditions in the clothing industry deteriorated markedly in the second half of the year. Domestic shipments of clothing products increased by 4.8 percent in dollar value during 1981, but

put actually declined in real terms. Imports, on the other hand, were up by more than 24 million units or 17.2 percent. Exports increased in value to \$264 million, a rise of 14.5 percent, but still represented only 6 percent of domestic shipments.

The Clothing Division provided technical expertise and background briefings to the CIRB, as well as tailored market evaluations to aid in the processing of company applications for assistance under the new program for clothing and textiles.

In negotiations of new five-year bilateral export restraint agreements with most low-cost suppliers, included during 1981, the division provided the negotiating teams with detailed perspectives of individual sectors and evaluations of market trends.

As part of its continuing effort to increase industry interest and participation in the export market, the division participated in the organization of trade fairs and recruitment of exhibitors for several international export shows. These activities included the Canadian Fashion Fair in Winnipeg; the Children's Apparel Manufacturers Association Show in Montreal; and participation by textile sportswear manufacturers in shows at Las Vegas, Munich and Tokyo, and by fur manufacturers at the American International Fur Fair in New York. On-site sales from these events totalled over \$8 million.

Fashion Office

A complete review was undertaken of the Fashion Design Assistance Program (FDAP) administered by "Fashion Canada/Mode du Canada". After considering the recommendations and comments of the consultant, the board of directors presented a proposed five-year plan for the continuation of FDAP for consideration to the CIRB.

The fourth issue of **Canada-Fashion-Mode** magazine was distributed through Trade Commissioners to fashion buyers around the world.

Fashion presentations featuring Canadian designers and geared to domestic and foreign buyers were supported in Toronto, Montreal and Winnipeg. These shows were well attended and received very favourable audience reaction.

Summer employment involving 48 manufacturers was provided for 60 students of fashion design. The project was funded under the Canada Employment Centres' Summer Canada: Summer Employment Program.

Leisure Industries

As a whole, the leisure industries sector enjoyed relatively good market conditions during 1981. However during the last quarter of 1981 it became apparent that economic conditions were weakening some subsectors, notably sporting goods, jewellery and housewares. Assistance provided under the Department's Enterprise Development Program has enabled many firms in this sector to undertake restructuring, product design and productivity improvement projects.

Exports of leisure goods increased from \$439.7 million in 1980 to \$461.7 million in 1981, a gain of five percent. In the export marketing field, major departmental activities during the year included the organization of export seminars tailored to the needs of commercial printers and jewellery producers; participation in 14 international trade fairs and solo shows in six countries (United States, England, West Germany, Italy, France and Japan); and the organization of two incoming buyers missions.

POLICY SECTOR

The Department's newly instituted Policy Sector, consisting of the Office of Policy Analysis and the Office of Policy Coordination, provided the Department with economic intelligence, strategic research and analysis, and policy planning coordination in respect of the economic and industrial development, trade policies and programs of ITC, other federal government departments and agencies, other levels of government and foreign governments.

Office of Policy Analysis

The Trade and Structural Analysis Directorate assembled and distributed international trade data from its UN Trade Data Bank and respecified the ITC Canadian Explor Model (CEM 1) into a new version called the Canadian Econometric Model for Structural Analysis (CEMSA). CEMSA will be used for related purposes including sectoral and structural policy simulations, medium-term structural forecasts for use in the interdepartmental medium-term outlook and federal-provincial occupational forecasting with CEIC, and major investment project and foreign sector simulation. Analytical projects of the group focussed on regional and sectoral subjects with implications for industrial development and adjustment policies and for commercial policy. Continued efforts were devoted to industry and community adjustment analysis for the Industry and Labour Adjustment Program (ILAP).

The Microeconomic Analysis Directorate conducted its semi-annual survey of business investment and its annual survey of foreign-owned subsidiaries, and published several reports resulting from these activities. The directorate prepared and analysed indexes of the utilization of industrial capacity and published quarterly reports on the results. A number of studies of new and technological change

processes were completed. Performance assessments of a number of manufacturing industries were undertaken to identify industrial development opportunities and constraints and to assess strategic policy options for these industries.

The Economic Intelligence Directorate provided information on current and prospective economic conditions in Canada and abroad. The directorate published its annual report on Canada's trade performance and examined Canada's competitive position and balance of payments position, especially as they relate to trading services.

The directorate also studied and reported in greater depth on current conditions in certain industries as well as specific economic policy changes in Canada and abroad.

Office of Policy Coordination

The Office of Policy Coordination maintained an overview of industrial and economic developments and identified broad policy directions to guide departmental policy work. The office assisted in the development of sectoral/regional initiatives and participated in departmental and interdepartmental efforts to address sectoral issues of particular regional or industrial importance.

The office provided assistance to the policy development activities of other federal departments and agencies which had a direct bearing on ITC objectives. This included such areas as trade, regional development, procurement and resource development. The office also coordinated federal-provincial activities of the Department, including the preparation of documents for meetings between these two levels of government, and managed various aspects of federal-provincial relations involving industrial development.

TOURISM

Canada's tourism industry registered a strong performance during 1981-1982, attracting a significant share of world travellers despite the effects of inflation, recession and high energy costs that dampened worldwide tourism. The favourable exchange rate of the Canadian dollar in relation to foreign currencies continued to be a positive factor for the country's tourism industry.

Tourism revenues for Canada in 1981-82 were estimated at \$16.5 billion, compared to \$14.8 billion in 1980-81. About \$12.8 billion was spent by Canadians, up from \$11.4 billion in the previous year. More than 39.5 million U.S. visitors spent \$2.4 billion. An estimated 2.14 million visitors from overseas spent \$1.3 billion, compared to 1.16 million overseas visitors and \$1.2 billion in spending in 1980-81.

The travel deficit decreased by 5.7 percent, from \$1.228 billion in 1980-81 to \$1.116 billion in 1981-82.

CANADIAN GOVERNMENT OFFICE OF TOURISM

The Canadian Government Office of Tourism (CGOT) operated 27 market development and promotional offices in 1981-82 - six in Canada, fourteen in the United States and one each in Britain, France, Germany, the Netherlands, Mexico, Australia and Japan.

Vacation Canada advertisements were placed in periodicals reaching almost 70 percent of all Canadians. New Canadians were encouraged to see Canada through a campaign in ethnic publications.

An estimated \$63 million of business was transacted at the fifth annual "Rendez-vous Canada" show in Halifax, May 17-21, 1981, an increase of \$26 million from 1980. This international marketplace attracted 293 selling organizations and 226 buying organizations, up from 1980 figures of 274 and 198 respectively.

The "Canada: So Much To Go For" Program, which encourages Canadians to travel within Canada, offered 120 competitively-priced package tours in 1981. Partners with CGOT in this venture included Air Canada, CP Air, VIA Rail, Pacific Western Airlines, Nordair and Voyageur.

The Office of Tourism began a new marketing strategy in the United States during 1981-82. The following were major initiatives:

- A market survey was planned to study possible American pleasure travellers to Canada and ascertain their attitudes and perceptions of Canada.
- Detailed profiles of Meetings and Incentive Travel (M&IT) prospects in the United States were begun and a computerized data bank was established.
- A full four-season consumer advertising campaign was re-instituted, thanks to incremental funds awarded for the U.S. market based on the tourism sector strategy.
- A direct marketing campaign for target segments such as skiing, outdoors, M&IT, etc., was conducted. CGOT won the "Golden Echo" award for its direct marketing program in the United States.
- Contracts were established with a public relations firm in Chicago and an M&IT firm in Washington.
- The CANMAP program was developed and added to the existing marketing mix.
- A series of six half-hour television programs was prepared and televised by cable to a potential viewing audience of over 30 million per show.

CGOT placed advertisements in major publications in the United Kingdom, France, Germany, the Netherlands, Mexico, Australia and Japan. This included an insert in *The Observer*, which has a circulation of more than one million. An extensive TV campaign was undertaken in Japan in cooperation with CP Air. Joint advertisements were placed with major industry partners in Australia, Mexico, Germany and the Netherlands.

The Attitude and Awareness Program is designed to highlight the need to welcome visitors with a high standard of friendly service. The program contains a national information element including advertising, publicity, brochures, films and a new slide presentation for use by industry spokesmen.

Another element is the "Welcome to Canada" Program whereby Canadian customs officers greet U.S. visitors with a quick-reference package of travel information.

In addition, the Office of Tourism:

- proceeded with market development work in South America, Southeast Asia and Southern Europe;
- distributed approximately eight million pieces of promotional literature and materials;
- sponsored more than 100 promotional seminars in Canada, the United States and overseas;
- provided some 400 media representatives with Canadian tours;
- prepared 100 travel features for publication in Canada and the United States; and
- produced 41 consumer and trade publications in as many as 12 languages.

TOURISM DEVELOPMENT BRANCH

The Tourism Development Branch is involved in providing a framework for improved tourism planning and development.

About \$17 million in financial assistance was provided during the past year for the construction of trade and convention centres in Vancouver, Montreal and Charlottetown.

A computerized national resource and product inventory system is currently being developed to aid in planning and a computer-assisted product-market match system has been studied.

By coordinating the development of a manpower training strategy, the branch is ensuring both the

availability and training of personnel within the tourism sector. The Tourism Development Branch also improves the environment for industry development by influencing federal legislation which may inhibit the tourism industry.

POLICY, PLANNING AND COORDINATION BRANCH

The Research and Analysis Division of Policy, Planning and Coordination (PPC) continued to analyze the results of four quarterly Canadian Travel Surveys. Market intelligence presentations were made to the trade and to partners in five European and eighteen Canadian cities. The branch's coordination secretariat organized the visits of both the Secretary General of the World Travel Organization and the Deputy General Director for Travel and Tourism of the People's Republic of China.

The Planning, Analysis and Evaluation Division became responsible for developing and implementing a corporate planning system within CGOT. Work continued on a revision of CGOT's forecasting models and on the conversion of the package tour inventory of the Office of Tourism from a manual to an automated system.

The Policy Formulation Division developed the tourism sector strategy, which outlines the major problems and opportunities facing the Canadian tourism industry. This resulted in an award of \$9 million from the Cabinet Committee for Economic Development over fiscal years 1981-82, 1982-83 and 1983-84. The division was active in ensuring that tourism concerns were considered in the VIA Rail cuts made by Transport Canada.

This branch has also been monitoring the acid rain situation and other environmental issues, as well as evaluating the energy situation with regard to supply, prices and allocation.

PERSONNEL

vision and modernization of several aspects of operation to create greater staff efficiency at all levels throughout the Department were achieved by the Personnel Branch during the 1981-82 fiscal year. The following are some of the programs carried out.

The Personnel Management Planning Process was totally revised to ensure greater input from management and a more responsive stance by the Personnel Branch to identified issues. The Department's Personnel Management Plan was tabled to the Human Resources Development Committee, at which the decision was taken to implement the plan in its revised format.

The Personnel Management Information System was revamped in order to provide more timely and accurate information for the use of both branch

staff and Department management. The Staffing Division substantially reduced the turn-around time of the staffing process by over 50 percent, in response to the needs of managers.

Employee Advisory and Career Services, in its second year of operation, provided employee consultations for 440 clients, an increase of 54 percent over the previous year. This significant increase may be attributed to the expanding operation of the career services.

The Lateral Transfer Program, which was endorsed by senior management, was implemented in 1981 to facilitate lateral mobility and horizontal career pathing of employees within the Department. The potential for success has been enhanced by giving managers direct responsibility for its implementation.

METRIC COMMISSION CANADA

As another major metric conversion initiative takes hold, the completion of Canada's metric conversion program draws nearer. Retail scales conversion, which began in 21 major centres across Canada on January 4, 1982, will see all store-weighted foods sold and advertised in metric measures by the end of 1983.

Conversion in other areas continues as well. A number of sector committees, including Water Transport and Petroleum Refineries, Wholesalers and Gasoline Service Stations, forecast that they would be operating predominantly in metric in 1982. At the beginning of 1982, the 102 sectors on average had completed more than half of their conversion programs.

Disseminating information is one of the most important parts of Canada's conversion program. Metric Commission Canada continues to inform people in Canada and abroad of the progress of its work through its annual report and a wide assortment of informative brochures; television and radio announcements; the **Metric Monitor**, a monthly newspaper; and the **Reporter**, a semi-annual sector update.

On January 12, 1982, the Prime Minister announced that Metric Commission Canada would in future be attached to the Department of Consumer and Corporate Affairs. This reassignment will facilitate close collaboration between metric conversion and the weights and measures activities of Consumer and Corporate Affairs.

INDUSTRY, TRADE AND COMMERCEStatement of Expenditures
for the Fiscal Year 1981-82

		\$ ('000)
<u>Trade and Industrial Program</u>		
Operating Expenditures		
- Salary and superannuation	99 348	
- Other	<u>190 137</u>	289 485
Grants and Contributions		
- Enterprise Development Program	134 665	
- Defence Industry Productivity Program	154 935	
- Program for Export Market Development	14 596	
- Capital subsidies for the construction of commercial and fishing vessels	72 943	
- Metric Conversion	8 912	
- Trade and Convention Centres	17 598	
- Small Business Loans - Losses	6 475	
- Payment of EDP Insurance Losses	44 257	
- Payment of EDC Insurance Losses	2 187	
- Payments for construction of dry docks	13 126	
- Miscellaneous	<u>6 358</u>	476 052
Loans and Investments		
- Loans to deHavilland Aircraft	110	
- Loans to assist defence manufacturers with defence plant modernization	<u>11 218</u>	11 328
		<u>776 865</u>
<u>Tourism Program</u>		
Operating Expenditures		
- Salary and superannuation	10 250	
- Other	<u>27 587</u>	37 837
Grants and Contributions		
- Miscellaneous		<u>1 562</u>
		<u>39 399</u>
<u>Grains Program</u>		
Operating Expenditures		
- Salary and superannuation	1 729	
- Other	<u>971</u>	2 700
Grants and Contributions		
- Credit Wheat Sales	17 403	
- Prairie Grain Advance Payment Act	12 735	
- Western Grain Stabilization Program	94 320	
- Assistance to the Canadian rapeseed processing industry	3 000	
- Brazil grain silos	4 385	
- Miscellaneous	<u>3 865</u>	135 708
		<u>138 408</u>
Total Department		<u>954 672</u>

INDUSTRY, TRADE AND COMMERCEStatement of Revenues
for the Fiscal Year 1981-82

	\$
<u>Return on Investments</u>	<u>('000)</u>
Interest on loans to Export Development Corporation	86 613
Interest on loans to Federal Business Development Bank	80 650
Interest on loans to Canadian Commercial Corporation	207
Interest on loans to assist manufacturers of automotive products	118
Interest on loans to assist the pharmaceutical industry	11
Interest on loans to assist the footwear and tanning industries	210
Interest on loans under the Enterprise Development Program	664
Sundry	346
<u>Miscellaneous Revenue</u>	24 433
<u>Refunds of Previous Year's Expenditures</u>	16 318
<u>Adjustment Prior Years Payable at Year End (PAYE)</u>	1 928

MINISTÈRE DE L'INDUSTRIE ET DU COMMERCE

l'état des revenus,

exercice financier 1981-1982

Revenus provenant d'investissements (en milliers de \$)

Intérêts sur des prêts consentis :

- à la Société pour l'expansion des exportations (SEE) 86 613

- à la Banque fédérale de développement (BFD) 80 650

- à la Corporation commerciale canadienne (CCC) 207

- à l'industrie des produits de l'automobile 118

- à l'industrie des produits pharmaceutiques 11

- aux industries de la chaussure et du cuir 210

- aux entreprises dans le cadre du programme d'expansion des entreprises 664

Autres 346

Revenus divers 24 433

Remboursements de dépenses effectuées au cours de l'exercice précédent 16 318

Ajustement relatif aux exercices précédents - comptes à payer en fin d'exercice 1 928

MINISTÈRE DE L'INDUSTRIE ET DU COMMERCE

État des dépenses,
exercice financier 1981-1982

Programme de l'expansion commerciale et industrielle		(en milliers de \$)	
ventions et contributions	134 665	99 348	289 485
Programme d'expansion des entreprises (PEC)			
Programme de production de matériel de défense (PPMD)	154 935	190 137	
Programme de développement des marchés d'exportation (PDMC)	14 596		
Programme d'aide à la construction de bateaux de pêche	72 943		
Conversion au système métrique	8 912		
Centres de commerce et de congrès	17 598		
Éclaircissements relatifs à des pertes	6 475		
Garanties de prêts - prêts aux petites entreprises	6 475		
Assurances-prêts - PEC	44 257		
Assurances et garanties de la Société pour l'expansion	2 187		
des exportations (SEC)	13 126		
Construction de cales sèches	6 358		
Autres investissements	110		
Prêts à la société de Havilland Aircraft			
Prêts consentis à l'industrie du matériel de défense	11 218		
Pour l'aider à moderniser ses usines			
Programme du tourisme			
Centres d'exploitation	10 250		
Traitements et pensions de retraite	27 587		
Autres			
ventions et contributions	1 562		
Autres			
Programme des céréales			
Centres d'exploitation	1 729		
Traitements et pensions de retraite	971		
Autres			
ventions et contributions	17 403		
Programme des paiements anticipés pour les céréales des Prairies	12 735		
Programme de stabilisation concernant le grain de l'Ouest	94 320		
Aide consentie à l'industrie canadienne de transformation du colza	3 000		
Autres	4 385		
Autres	3 865		
Programme de l'expansion commerciale et industrielle	135 708		
Programme de l'expansion commerciale et industrielle	138 408		
Programme de l'expansion commerciale et industrielle	954 672		

LA COMMISSION DU SYSTÈME MÉTRIQUE CANADA

Avec une autre initiative importante de conversion au système métrique, le programme de conversion au Canada tire à sa fin. La conversion des balances dans le commerce de détail, qui a débuté le 4 janvier 1982 dans 21 grands centres du Canada, sera achevée à la fin de 1983; à cette date, tous les produits alimentaires seront annoncés et vendus en mesures métriques.

La conversion se poursuit également dans d'autres domaines. Un certain nombre de comités sectoriels, notamment ceux du transport maritime et des raffineries de pétrole, des grossistes et des stations-service, prévoient que l'utilisation du système métrique sera pratiquement généralisée en 1982. Au début de 1982, les 102 secteurs avaient, en moyenne, réalisé plus de la moitié de leur programme de conversion au système métrique.

La diffusion de renseignements représente un des aspects les plus importants du programme de conversion au système métrique au Canada. Grâce à une vaste gamme de brochures d'information, à de la publicité à la télévision et à la radio, à de nombreuses publications comme le **Moniteur métrique**, un journal mensuel, et le **Reporter**, une publication semestrielle sur l'actualité sectorielle, ainsi qu'à son propre rapport d'activité, la Commission du système métrique du Canada continue d'informer les gens, tant au pays qu'à l'étranger, sur l'avancement de ses travaux.

Le 12 janvier 1982, le Premier ministre annonçait que la commission relèverait dorénavant du ministère de la Consommation et des Corporations. Ce transfert favorisera l'établissement de liens plus étroits entre les activités de conversion et les activités relatives aux poids et mesures de ministère.

direction du ministère dispose de données plus précises et plus opportunes. Pour mieux répondre aux besoins des gestionnaires, la Division de la dotation a réduit, de plus de 50 %, la durée du processus de dotation.

Le Service de consultations et d'orientation professionnelle, créé il y a deux ans, a accordé des consultations à 440 employés, ce qui constitue une augmentation de 54 % par rapport à l'exercice précédent. Cette hausse importante est peut-être attribuable à l'expansion du service d'orientation.

Le programme de mutations latérales, qui a été approuvé par la haute direction, a été exécuté en 1981 dans le but d'accroître la mobilité latérale des employés tant au sein du ministère qu'à l'extérieur de la fonction publique. En confiant directement aux gestionnaires la responsabilité de la mise en oeuvre de ce programme, on en a accru d'autant les possibilités de succès.

1981-1982, la Direction du personnel a procédé à révision et à la modernisation de plusieurs aspects de ses activités dans le but d'accroître l'efficacité du personnel, à tous les niveaux, au ministère. Les sections suivantes offrent aperçu des activités entreprises par la section.

processus de planification de la gestion du personnel a été entièrement révisé afin de assurer que les gestionnaires seront mieux en mesure d'y participer, et que la direction prendra positions mieux adaptées à l'égard des problèmes relevés. Le plan de gestion du personnel du ministère a été présenté au Comité chargé du perfectionnement des ressources humaines, lequel a décidé de mettre en application version révisée du plan.

ystème d'information sur la gestion du personnel a été amélioré pour faire en sorte que personnel de la direction et de la haute

Le tourisme, de même que des débouchés qui s'offrent à elle. Le Comité du Cabinet chargé du développement économique a donc accordé à l'office des crédits d'une valeur de 9 millions de dollars, répartis entre les exercices financiers 1981-1982, 1982-1983 et 1983-1984. La division a fait en sorte que Transports Canada tienne compte des conséquences sur le tourisme de ses réductions de services touchant VIA Rail.

La direction a également examiné la situation des plûtes acides et d'autres sources de préoccupation relatives à l'environnement, et elle a procédé à une évaluation de la situation énergétique en ce qui a trait à l'offre, aux prix et à l'affectation des ressources.

L'amélioration de la planification et du développement du tourisme.

Quelque 17 millions de dollars ont été versés au cours de l'exercice pour favoriser la construction de centres de commerce et de congrès à Vancouver, à Montréal et à Charlottetown.

Afin de faciliter les activités de planification, on procède actuellement à la mise au point d'un système informatisé permettant de dresser l'inventaire des ressources et des produits au pays. Un système informatisé de concordance produit-marché a également fait l'objet d'une étude.

En coordonnant la mise au point d'une stratégie de formation de la main-d'oeuvre, la direction poursuit un double objectif, soit d'assurer la formation de la main-d'oeuvre pour que l'industrie touristique dispose du personnel spécialisé qui lui est nécessaire. Elle contribue, en outre, à rendre le milieu plus propice au développement de l'industrie touristique en faisant valoir le point de vue de cette dernière lorsque des mesures législatives du gouvernement fédéral risquent de lui être nuisibles.

LA DIRECTION DES POLITIQUES, DE LA PLANIFICATION ET DE LA COORDINATION

La Division de la recherche et de l'analyse de la politique, de la planification et de la coordination a poursuivi son analyse des résultats de quatre enquêtes trimestrielles sur les voyages au Canada et elle a présenté des renseignements sur les marchés à l'industrie touristique et à ses partenaires dans cinq villes européennes et dans 18 centres canadiens. Le secrétariat de la coordination de la direction a organisé les visites du secrétaire général de l'organisation internationale du tourisme et du sous-directeur général du tourisme de la République populaire chinoise.

La Division de la planification, de l'analyse et de l'évaluation a été chargée d'élaborer et de mettre en application un système de planification intégré au sein de l'office. Les travaux de révision des modèles prévisionnels du tourisme de l'office se sont poursuivis, ainsi que la conversion, d'un mode de traitement manuel à un mode de traitement automatisé, de l'inventaire des voyages à forfait de l'office.

La Division de l'élaboration des politiques a élaboré la stratégie du secteur du tourisme, laquelle donne un aperçu des principaux problèmes que doit affronter l'industrie canadienne du

Office a fait de la publicité dans d'importantes publications du Royaume-Uni, de la France, de l'Allemagne de l'Ouest, des Pays-Bas, du Mexique, l'Australie et du Japon, y compris un encart dans *The Observer*, dont le tirage dépasse le million d'exemplaires. En collaboration avec Air, une vaste campagne télévisée a été menée au Japon. Des réclames publicitaires conjointes ont été faites avec d'importants partenaires austro-allemands, au Mexique, en Allemagne de l'Ouest et dans les Pays-Bas.

programme de sensibilisation au tourisme vise à attirer la nécessité de bien accueillir les visiteurs en leur offrant des services courtois de haute qualité. Le programme comporte un plan national d'information, qui prévoit la création de bureaux de brochures et de films, ainsi que la répartition d'une nouvelle présentation de positions qui pourra être utilisée par les représentants de l'industrie.

autres améliorations ont été apportées à ce chapitre, par le biais du programme bienvenue au Canada, dans le cadre duquel les douaniers canadiens accueillent les touristes américains en leur remettant un jeu de dépliants touristiques de consultation rapide.

Office a également entrepris les activités

suivantes :

La réalisation de projets de promotion en Amérique du Sud, en Asie du Sud-Est et dans les pays du sud de l'Europe;

La diffusion de quelque huit millions

d'imprimés et d'articles de promotion;

des mesures de soutien à plus de 100 colloques de promotion au Canada, aux États-Unis et

en outre-mer;

L'organisation, à l'intention de quelque

400 représentants des médias, d'excursions au

Canada;

La rédaction d'une centaine d'articles sur les

voyages qui seront publiés au Canada et aux

États-Unis;

La publicité, à l'intention des consommateurs et de l'industrie touristique, de 41 ouvrages dont certains sont parus dans 12 langues.

A DIRECTION DU DÉVELOPPEMENT DU TOURISME

A Direction du développement du tourisme a pour fonction de mettre au point un cadre visant

LE TOURISME

L'industrie canadienne du tourisme a connu une bonne année en 1981-1982. Le Canada a, en effet, accaparé une part importante du marché international du tourisme, bien que les activités aient diminué, à l'échelle mondiale, dans ce secteur en raison de l'inflation, de la récession et des coûts élevés de l'énergie. Le taux de change avantageux du dollar canadien, par rapport aux devises étrangères, a continué à favoriser cette industrie.

Les recettes touristiques du Canada, en 1981-1982, ont été évaluées à 16,5 milliards de dollars, comparativement à 14,8 milliards en 1980-1981. Les Canadiens ont dépensé quelque 12,8 milliards de dollars, ce qui représente une augmentation par rapport aux 11,4 milliards de dollars enregistrés au cours de l'exercice précédent. Plus de 39,5 millions de touristes américains ont dépensé 2,4 milliards de dollars au pays. Quelques 2,14 millions de touristes d'outre-mer y ont, pour leur part, déboursé 1,3 milliard de dollars, comparativement aux 2,16 millions de touristes qui avaient dépensé 1,2 milliard de dollars au cours de l'exercice précédent.

Le déficit touristique a diminué de 5,7 % pour passer de 1,228 milliard de dollars en 1980-1981 à 1,116 milliard en 1981-1982.

L'OFFICE DE TOURISME DU CANADA

En 1981-1982, l'Office de tourisme du Canada (OTC) a assuré la régie d'un réseau de 27 bureaux de promotion et d'expansion des marchés - six au Canada, 14 aux États-Unis et un dans chacun des pays suivants : Grande-Bretagne, France, Allemagne de l'Ouest, Pays-Bas, Mexique, Australie et Japon.

Des réclames publicitaires pour promouvoir les vacances au Canada ont été placées dans des périodiques, ce qui a permis de rejoindre près de 70 % de l'ensemble des Canadiens. Une campagne menée dans des publications de langues étrangères, incitait les Néo-Canadiens à visiter le Canada.

La cinquième exposition annuelle Rendez-vous Canada, qui s'est déroulée à Halifax du 17 au 21 mai 1981, a suscité un chiffre d'affaires évalué à 63 millions de dollars, ce qui représente une augmentation de 26 millions de dollars par rapport à 1980. Ce marché international a attiré

293 organismes vendeurs et 226 organismes acheteurs, alors que ces chiffres, en 1980, s'établissaient à 274 et à 198 respectivement. Dans le cadre du programme Canada : Faites le tour!, qui encourage les Canadiens à voyager au Canada, on a offert, à des prix concurrentiels, 120 voyages à forfait en 1981. Les associés de l'Office dans ce programme sont Air Canada, CP Air, VIA Rail, Pacific Western Airlines, Nordair et Voyageur.

L'Office de tourisme a adopté une nouvelle stratégie de commercialisation aux États-Unis en 1981-1982. Au nombre des principales initiatives entreprises figuraient :

- la planification d'une étude de marché visant recueillir des données sur les touristes américains susceptibles de visiter le Canada et à évaluer leurs attitudes envers le Canada et la perception qu'ils en ont;
- la préparation de profils détaillés des possibilités que le marché américain offre au Canada au chapitre des congrès et des voyages de motivation (C et VM) et la mise sur pied d'une banque de données informatisées;
- la remise sur pied d'une campagne publicitaire étalée sur l'année entière et s'adressant aux consommateurs, grâce aux crédits supplémentaires affectés au marché américain dans le cadre de la stratégie du secteur touristique;

- le lancement d'une campagne de commercialisation directe visant des secteurs ciblés tels le ski, les activités de plein air les C et VM, etc.; l'Office a reçu le prix Golden Echo pour son programme de commercialisation directe aux États-Unis;
- la conclusion de marchés avec une entreprise d'entreprises publiques de Chicago et avec une entreprise de C et VM de Washington;
- l'élaboration du programme CAN-MAP qui est venu s'ajouter au plan de commercialisation;

La réalisation d'une série de six émissions de télévision, d'une demi-heure chacune, et sa télédiffusion, par câblodistribution, auprès d'un public potentiel de plus de 30 millions de spectateurs par émission.

Un certain nombre d'études relatives aux nouvelles processus de changements technologiques ont été achevées. On a évalué le rendement d'un certain nombre d'industries manufacturières dans le but de déterminer les possibilités et les contraintes en matière de développement industriel et d'évaluer les options qui s'offrent à ces industries en matière de stratégie politique. Le Directeur des renseignements économiques a fourni des données sur la situation économique actuelle et future tant au Canada qu'à l'étranger. Il a publié son rapport annuel sur le rendement commercial du Canada et il a évalué la compétitivité du Canada et sa balance des paiements, plus particulièrement en ce qui a trait au commerce des services. Enfin, le directeur a étudié en profondeur les conditions qui régissent actuellement dans certaines industries, de même que des changements précis qui ont été apportés à la politique économique au Canada et à l'étranger, et il en a fait rapport.

Le Bureau de la coordination des politiques

Le Bureau de la coordination des politiques, se fondant sur sa vue d'ensemble de l'évolution de la situation industrielle et économique, a déterminé, en matière de politiques, de grandes orientations qui guideront le ministère dans ses travaux. Le Bureau a contribué à l'élaboration d'initiatives nouvelles et régionales, tout en prenant part aux efforts ministériels et interministériels déployés pour faire face aux difficultés qui se posent dans certains secteurs et qui revêtent, pour la région ou l'industrie, une importance particulière.

Le Bureau a également participé à l'élaboration des politiques ministérielles et organiques fédérales, lorsque des politiques touchaient directement les objectifs du ministère, notamment dans des domaines comme le commerce, le développement régional, les achats gouvernementaux et la mise en valeur des ressources naturelles. Enfin, le Bureau a coordonné les activités fédérales-provinciales du ministère dont la rédaction de documents en vue de réunions entre ces deux niveaux de gouvernement, et il s'est occupé de divers aspects des relations fédérales-provinciales touchant le développement industriel.

Le nouveau secteur des politiques du ministère se compose du Bureau de l'analyse des politiques et du Bureau de la coordination des politiques. Il fournit au ministère des renseignements économiques, effectués des recherches et des analyses stratégiques et assume la planification et la coordination des politiques touchant le développement économique et industriel et voit aux initiatives et programmes commerciaux qui sont mis en avant tant par le ministère ou par d'autres ministères et organismes fédéraux que par les autres niveaux de gouvernement ou les gouvernements étrangers.

Bureau de l'analyse des politiques

Le Directeur de l'analyse commerciale et culturelle a rassemblé et diffusé des données sur le commerce international extraites de la banque de données commerciales des Nations unies et a redéfini le modèle canadien Export (MCE 1) du C, dont la nouvelle version est désignée sous le nom de modèle économique canadien d'analyse culturelle (MECAS). Ce dernier sera utilisé à fins analogues dont, notamment, des simulations de politiques sectorielles et structurelles, des prévisions structurelles à moyen terme devant servir dans l'aperçu interministériel à moyen terme et des prévisions fédérales-provinciales au niveau de l'emploi en collaboration avec la Commission de l'emploi et de l'immigration du Canada, ainsi que des simulations de grands objets d'intérêt pour le Canada et les autres pays étrangers. Les projets d'analyse ont porté sur des questions régionales et sectorielles ayant une incidence sur les politiques d'adaptation et de développement industriel et sur la politique commerciale. Des efforts soutenus ont été déployés pour effectuer des analyses de l'adaptation de l'industrie et de la collectivité au cadre du programme d'aide à l'adaptation (PAAIM). L'industrie et de la main-d'œuvre (PAAIM).

Le Directeur de l'analyse micro-économique a effectué son enquête semestrielle sur les investissements des entreprises et son enquête annuelle sur les filiales de propriété étrangère, publié ensuite plusieurs rapports à partir des données recueillies. Le directeur a élaboré et analysé des indices pour mesurer l'utilisation de la capacité industrielle, et il a publié des rapports trimestriels sur les résultats obtenus.

perspectives de chaque secteur et des évaluations quant aux tendances des différents marchés.

Dans son effort constant pour augmenter la participation de l'industrie sur les marchés d'exportation et pour stimuler son intérêt à cet égard, la division a contribué à l'organisation de foires commerciales et au recrutement d'exposants pour plusieurs expositions internationales. Au nombre de ces activités figurait sa participation à l'organisation du Salon de la mode canadienne, à Winnipeg, et à celui de l'Association des fabricants de vêtements d'enfants, à Montréal; elle a, en outre, favorisé la participation de fabricants de vêtements de sport à des expositions à Las Vegas, à Munich et à Tokyo, ainsi que celle de fabricants de vêtements de fourrure à l'American International Fur Fair de New York. Les ventes réalisées sur place à ces diverses occasions ont totalisé plus de 8 millions de dollars.

La mode

Le Bureau de la mode a entrepris un examen exhaustif du programme d'aide aux créations de la mode, qu'administre Mode du Canada/Fashion Canada. Après avoir pris en considération les recommandations et les observations de l'expert-conseil, le conseil d'administration a soumis à l'OCRI, aux fins d'examen, un plan quinquennal visant la prolongation du programme.

Le quatrième numéro de la revue **Canada-Fashion-Mode** a été distribué par l'entremise des délégués commerciaux aux acheteurs de collections de mode partout dans le monde.

Des présentations de collections de mode destinées aux acheteurs canadiens et étrangers et mettant en vedette des dessinateurs canadiens ont été parainées à Toronto, à Montréal et à Winnipeg. Ces défilés ont attiré beaucoup de monde et suscité une réaction très favorable de la part du public qui y a assisté.

Les articles de loisirs

Dans son ensemble, le secteur industriel des articles de loisirs a connu d'assez bonnes conditions commerciales en 1981. Toutefois, au cours du dernier trimestre de 1981, il devenait évident que la situation économique affaiblissait certains sous-secteurs, notamment ceux des articles de sport, de la bijouterie et des articles ménagers. L'aide accordée dans le cadre du programme d'expansion des entreprises a permis à nombre de firmes de ce secteur de se lancer de nouveaux projets de restructuration, d'accroissement de la productivité et de conception de produits.

Les exportations d'articles de loisirs sont passées de 439,7 millions de dollars en 1980 à 461,7 millions de dollars en 1981, ce qui représente une hausse de 5 %. Dans le domaine de la commercialisation des exportations, le ministre a, notamment, organisé, pour répondre aux besoins des imprimeurs commerciaux et des fabricants de bijoux, des colloques sur les exportations, participé à l'organisation de 14 foires commerciales internationales et expositions solos dans 6 pays (États-Unis, Angleterre, Allemagne de l'Ouest, Italie, France et Japon) et parainé la venue de deux missions d'acheteurs étrangers au Canada.

tion, d'arrangements en vue de limiter les importations de certains produits pour une période de cinq ans et la création de l'OCRI, qui disposera d'un budget de 250 millions de dollars pour venir en aide tant aux industries du textile et du vêtement qu'aux collectivités locales et aux industries.

La situation du marché dans l'industrie du textile s'est modifiée de façon radicale au cours du deuxième semestre de 1981 et la récession a continué de ralentir l'activité de cette industrie et d'y faire baisser les niveaux des bénéfices et de l'emploi. Quelques sous-secteurs, en particulier l'industrie du tapis et celle des tissus de laine, ont été plus durement touchés que d'autres.

Les importations de textiles se sont accrues de 14 % en termes monétaires en 1981, mais la part du marché canadien occupée par les importations est demeurée stable à 27 %. Les exportations canadiennes ont atteint 473,9 millions de dollars, ce qui représente une augmentation de 12 % par rapport à 1980-1981. La Division des textiles a recouvert des exposants et elle a aidé à organiser l'étranger trois salons des textiles du vêtement et un salon du tapis. Ces expositions ont été fructueuses pour cette industrie, puisqu'elles ont favorisé les exportations vers l'Europe, le Japon et l'Amérique centrale.

Le vêtement

La situation dans l'industrie du vêtement s'est considérablement dégradée au cours du deuxième semestre de 1981. Les exportations canadiennes de produits du vêtement ont augmenté de 4,8 % en termes monétaires en 1981, mais la production a, en termes réels, effectivement diminué. Les importations ont, pour leur part, augmenté de plus de 24 millions d'unités, ce qui représente un hausse de 17,2 %. Si la valeur des exportations a augmenté de 14,5 % pour atteindre 264 millions de dollars, elle n'en continue pas moins de ne représenter que 6 % des exportations canadiennes. La Division du vêtement a fait profiter l'OCRI de ses compétences techniques; elle a préparé des séances d'information et son intention est lui a fourni des évaluations de marché détaillées afin de l'aider à étudier les demandes d'aide des entreprises au titre du nouveau programme pour les industries du textile et du vêtement.

Lors de la négociation des nouveaux arrangements bilatéraux, conclus en 1981-1982 avec la plupart des fournisseurs et faibles coûts de production, ont visé à limiter leurs exportations pour un but précis et à limiter les exportations pour un but précis. La division a fourni aux parties négociatrices un aperçu détaillé des

féb. de 1981, le Tribunal antidumping a été, dans son rapport sur l'industrie de la soie, que même si l'industrie canadienne peut tenir la concurrence des importations en l'absence des pays industrialisés, elle serait même touchée, en l'absence de mesures spéciales de protection, par les importations venant de pays à faibles coûts de production. L'Inde et la Corée du Sud, d'un côté, la majeure partie des importations de soies autres qu'en cuir. Le gouvernement a engagé, depuis le 1^{er} décembre 1981, les importations de chausssures autres qu'en cuir, y compris les chausssures en toile, avec un plafond de 55 millions de paires.

Plus des mesures spéciales de protection, le gouvernement, dans le cadre de la politique changeant les industries de la chaussure et du cuir, a annoncé en novembre 1981, fournit l'aide financière aux fabricants en vue de leur mettre de restructurer et de moderniser leur entreprise tout en soutenant les travailleurs et les collectivités. L'Office canadien pour le commerce international (OCRI) s'est vu confier la responsabilité de la mise en application de ces mesures d'aide. Dans l'exécution du programme, l'OCRI est soutenu par la Division de la chaussure et du cuir qui lui fournit des informations détaillées de sous-secteurs et des entreprises, ainsi que des conseils techniques. Le secteur du tannage du cuir, la production l'industrie canadienne a augmenté de 5,8 % en 1980, pour atteindre près de 10 millions de mètres carrés; cette hausse est en grande partie attribuable à l'accroissement de la demande dans l'industrie de la chaussure.

Instrument de musique

La deuxième fois, le ministère a participé à la foire commerciale internationale Musikmesse de Francfort (Allemagne). Ainsi, 10 fabricants canadiens d'instruments de musique, de matériel sonore et accessoires y ont présenté leurs produits en 1982. Les ventes réalisées sur place ont atteint 385 000 \$, et l'on prévoit des ventes futures supérieures à 4,5 millions de dollars.

Textiles

industrie du textile et du vêtement a accueilli favorablement l'annonce d'une nouvelle politique visant ces secteurs. Les principaux points de la politique remaniée sont la renégociation,

programme, comparativement à cinq annuellement au cours de chacun des trois exercices précédents.

Les travaux se sont poursuivis en vue de mettre en application l'Accord sur les obstacles techniques au commerce que le Canada a signé en 1979 dans le cadre de l'Accord général sur les tarifs douaniers et le commerce (GATT). Le Conseil du Trésor a approuvé et communiqué aux sous-ministres et directeurs d'organismes fédéraux une directive qui énonçait les méthodes et pratiques que les ministères et organismes devaient suivre, au moment de l'élaboration, de l'adoption ou de l'application de règlements techniques, de normes et de systèmes de certification pour respecter les dispositions de l'accord. Le contrat relatif à l'exploitation d'un centre d'information, chargé de fournir les renseignements (sur les normes, les règlements techniques et les systèmes de certification canadiens) dont, par suite de la signature de l'accord, on pourra avoir besoin, a été renouvelé avec le Conseil canadien des normes.

La direction a réalisé une étude détaillée du rôle que pourrait être appelée à jouer la Société canadienne des brevets et d'exploitation, limitée (SCBEL) en matière de transfert de la technologie à l'industrie.

LA DIRECTION DES TEXTILES ET DES PRODUITS DE CONSOMMATION

Dans le cadre d'une nouvelle politique gouvernementale, la Direction des textiles et des produits de consommation a mis sur pied un programme d'adaptation de 267 millions de dollars visant à stimuler la croissance des industries du vêtement, du textile, de la chaussure et du tannage et à venir en aide aux collectivités et aux travailleurs les plus touchés par la concurrence internationale. La nouvelle politique prévoit la prolongation de cinq ans des restrictions bilatérales du vêtement et des textiles.

La direction s'est assurée le concours de l'industrie, qui a participé à des expositions commerciales, par ailleurs par le gouvernement fédéral, sur les principaux marchés mondiaux; elle a aussi organisé des missions commerciales au pays et à l'étranger pour promouvoir l'achat de produits canadiens.

Le rendement de l'industrie a fluctué au cours de 1981-1982. L'industrie du textile a plutôt bien commencé l'exercice mais, par suite d'une brusque détérioration des conditions, elle a connu un

ralentissement au cours des six derniers mois. Le même phénomène s'est produit dans l'industrie du vêtement.

Les meubles et la chaussure

Les meubles - Les expéditions totales de meubles ont représenté plus de 2,6 milliards de dollars en 1981, ce qui constitue une hausse de 16 % par rapport à l'année précédente.

L'aide fournie dans le cadre du programme d'expansion des entreprises (PEE) a permis à un certain nombre de plus petits fabricants d'entreprendre des projets de restructuration, d'accroissement de la productivité et de conception de produits.

Avec l'aide du ministère, le secteur des meubles États-Unis, plus particulièrement à Columbus, à Boston, à Seattle et à Atlanta. En 1981-1982, les exportations de meubles de bureau ont atteint 150 millions de dollars, soit 30 % des expéditions manufacturières.

Des fabricants de meubles résidentiels ont, enco une fois, participé au Southern Furniture Market à High Point (Caroline du Nord). En outre, le ministère a aidé les entreprises à accroître leurs ventes dans le grand New York en organisant une série d'expositions solos, des visites d'acheteurs étrangers et des missions canadiennes de promotion des ventes.

La chaussure et le cuir - L'industrie canadienne de la chaussure a fabriqué, en 1981, 43,4 millions de paires de chaussures pour une valeur totale de 830 millions de dollars, ce qui représente, par rapport à 1980, un accroissement de 2,6 % du nombre de paires et de 15,8 % de la valeur totale.

La valeur des exportations de cette industrie a atteint 68,2 millions de dollars, ce qui constitue une augmentation de 3,3 % par rapport à 1980. Grâce aux programmes d'expansion des exportations l'industrie est parvenue à diversifier ses marchés d'exportation et à atteindre d'autres marchés que celui des États-Unis, lequel demeure néanmoins son principal débouché. Les exportations vers la Communauté économique européenne (CEE) ont totalisé 11,7 millions de dollars en 1981.

et les politiques d'aide à l'industrie de l'ensei-
gnement assisté par ordinateur. Le ministère
utilise les résultats de tels projets de recherche
pour élaborer des politiques de promotion de
l'innovation industrielle au Canada et pour faire
connaître aux chercheurs des universités les
besoins et les débouchés industriels. Les divers
programmes d'aide susmentionnés et d'autres
programmes analogues administrés par le ministère
ont été regroupés pour former le programme d'aide
aux institutions.

Un programme de l'exercice, au cours de l'exercice,
un programme en vue de faire mieux connaître la
conception et la fabrication assistées par
ordinateur et d'accroître leur utilisation dans
l'industrie canadienne. Outre les exposés
présentés à plusieurs colloques et conférences, la
direction a diffusé, après de plus de 1 800 des-
tinataires, un bulletin mensuel sur le sujet ainsi
qu'une nouvelle publication renfermant une série
d'articles sur cette technologie et ses applica-
tions, après de 4 000 personnes du domaine
technique et administratif oeuvrant au sein de
l'industrie. Elle a aussi achevé la préparation
d'un nouveau répertoire des sociétés canadiennes
qui offrent des produits et services en matière de
conception et de fabrication assistées par
ordinateur.

Les études se sont poursuivies en vue de définir
les possibilités d'expansion industrielle qui
résulteraient des découvertes récentes en
biotechnologie, et de déterminer si le ministère
devrait éventuellement mettre en oeuvre une
stratégie et un programme pour aider l'industrie à
devenir concurrentielle dans ce domaine.

La direction a contribué aux études
interministérielles touchant la proposition
d'élargir le programme spatial du gouvernement
fédéral. Elle a également, conjointement avec le
ministère des Communications, mené une étude en
vue d'évaluer les avantages pour le Canada de
continuer à participer au programme de grand
satellite (L-SAT) de l'Agence spatiale européenne
et elle a au point des renseignements sur les
coûts et avantages reliés à l'examen des
prochaines étapes des programmes M-SAT et
RADARSAT.

Des travaux ont été achevés sur l'élargissement du
champ d'application du programme de recherche et
de développement de l'énergie industrielle
(PRDEI), qui vise à favoriser la mise au point de
techniques et de procédés nouveaux et améliorés
afin de réduire la consommation d'énergie
industrielle. En 1981-1982, 12 projets
industriels ont été approuvés dans le cadre de ce

vernement fédéral à verser 60 millions de
dollars à l'appui des objectifs d'expansion indus-
trielle et commerciale pour le nouveau système
avancé de transport à capacité intermédiaire
au point par l'Urban Transit Development
portation et vendu à la ville de Vancouver.
système sera l'une des principales attractions
xpo 86 à Vancouver et il permettra de mettre en
sur les capacités de la technologie canadienne
s le domaine du transport urbain.

DIRECTION DE LA TECHNOLOGIE

cours de l'exercice, un institut de recherche
industrielle (IRI), sept centres de technologie de
l'Association de recherche
industrielle (ARI) ont reçu des contributions dans
le cadre du programme d'aide aux institutions du
ministère. Ce programme a pour but d'encourager
les universités, les organismes provinciaux
et les groupes industriels à acquiescer la
recherche d'entreprendre des travaux de recherche
de développement pour l'industrie et de lui
fournir des conseils et services techniques. En
1982, deux CTF ont été créés : l'Institut
national des pêcheries de Halifax, au Collège
national de la Nouvelle-Écosse, et le Centre
national des instruments de pointe, au Conseil de
recherche de la Saskatchewan. Ces deux nouveaux
centres s'ajoutent aux sept IRI, aux cinq CTF et aux
ARIs créés précédemment au pays dans le cadre
du programme et qui sont actuellement financés par
le ministère de l'Industrie et des Ressources
humaines et des services aux entreprises
industrielles et à d'autres clients.

ministère a, en outre, fourni de l'aide
financière à deux centres d'innovation qui ont
un d'eux est affilié à l'Université de Waterloo.
l'autre, à l'École polytechnique de Montréal.
centres évaluent les inventions, aident à la
commercialisation de nouveaux produits et
favorisent l'établissement de nouvelles
entreprises axées sur la technologie.

Le ministère a continué à fournir de l'aide à quatre centres
d'étude en administration internationale d'univer-
ités canadiennes et aux instituts de conseils en
gestion de l'Université de l'Alberta et de
l'Université Laval. Dans le cadre du programme
industriel sur les innovations technologiques, des
travaux ont été accordés à un chercheur indépen-
ant et à neuf chercheurs universitaires pour
représenter des études dans des domaines comme la
technologie stratégique de l'innovation techno-

sur la commercialisation des exportations. Des projets importants ont reçu de l'aide en vertu du PME et des missions commerciales de visiteurs et de délégués ont été organisées pour les marchés d'Amérique latine, d'Afrique et du sous-continent asiatique; des entreprises canadiennes vendront, de ce fait, à l'Algérie pour 200 millions de dollars de locomotives et de services d'aide technique et au Nigéria pour 431 millions de dollars de locomotives, de rails et de matériel ferroviaire roulant. Grâce à l'aide de la Société pour l'expansion des exportations (SCE) et de l'Agence canadienne de développement international (ACDI), les commandes ont atteint respectivement 14 millions de dollars au Cameroun, 30 millions en Tunisie, 29 millions au Zimbabwe, 155 millions en Egypte et 100 millions en Indonésie. Les fonctionnaires du ministère continuent à chercher des débouchés dans d'autres pays en collaborant étroitement avec l'ACDI et la SCE dans le cadre de ces projets.

La Division des systèmes de transport ferroviaire a organisé et parrainé l'adhésion du ministère à l'Association du congrès panaméricain des chemins de fer (ACPCF) et à l'Association of American Railroads afin de promouvoir la coopération industrielle et technique, ainsi que les échanges en matière de recherche et de développement. Une mission, formée de représentants de 50 entreprises canadiennes, a assisté à la quinzième conférence de l'ACPCF, qui a eu lieu au Mexique en octobre 1981. La division a aussi établi des liens étroits avec l'Union des chemins de fer africains, qui regroupe 32 pays, pour faire connaître les produits, les normes et les compétences techniques du Canada.

La mise au point de la locomotive de la société Bombardier demeure le principal projet de recherche et de développement du secteur des chemins de fer. Étale sur une période de sept ans, ce projet de 54 millions de dollars s'inscrit dans le cadre du programme d'expansion des entreprises (PCE) et il a pour but de renforcer la position des produits de Bombardier sur le marché et d'accroître le potentiel de l'entreprise en matière de recherche et de développement. Un autre projet, également entrepris en vertu du même programme (d'une valeur de 350 000 \$) et qui visait la mise au point d'un régulateur de tension à grande vitesse, a été réalisé avec succès et des ventes d'unités de production ont été effectuées par la suite. Un projet antérieur, exécuté dans le cadre du programme pour l'avancement de la technologie industrielle (PAII) et touchant la mise au point des premières grues sur rail entièresment hydrauliques, fabriquées au Canada et devant être vendues aux chemins de fer du pays, a connu son premier succès de ventes à l'export-

Le transport urbain

tation, vers les États-Unis, d'une valeur de 1,2 million de dollars. La deuxième année d'essai du prototype du pilon à grande vitesse, projet évalué à 3,5 millions de dollars et entrepris grâce à de l'aide accordée aux termes du PAII, a pris fin, et le secteur ferroviaire canadien espère qu'il contribuera à améliorer la productivité dans le domaine de l'entretien des voies ferrées. Les autres projets de financement du ministère envisagés dans le cadre du PCE portent sur une dégarissuse-cibleuse à grande vitesse et sur une voiture transcontinentale à deux étages.

La division a continué à collaborer avec l'industrie et d'autres ministères dans le domaine de l'électrification des chemins de fer. Les premières initiatives dans ce domaine s'adressaient surtout à la construction d'une ligne de chemin de fer électrifiée pour la société de chemin de fer de la Colombie-Britannique.

Les efforts déployés par les fabricants canadiens de matériel de transport urbain ont continué d'être très fructueux tant sur le marché intérieur qu'extérieur; leurs ventes, au cours de l'exercice, ont atteint environ 1,8 milliard de dollars. La direction a continué à participer activement à la promotion des exportations du secteur en parrainant des foires commerciales et des missions, ainsi que d'autres activités dont, notamment, une exposition importante qui a été présentée à l'Americas Public Transit Association à Chicago en octobre 1981. Les exportations ont reçu environ 350 000 \$ d'aide dans le cadre du PME, et le développement industriel a été favorisé grâce à l'aide accordée aux termes du PCE, notamment dans le cas de l'Ontario Bus Industries qui a ainsi pu mettre au point un autobus de modèle réduit.

L'aide fournie par la direction en matière de commercialisation a favorisé nettement plusieurs pertes importantes de l'industrie sur les marchés d'exportation. Les fabricants ont obtenu des commandes importantes sur le marché américain pour des voitures de métro et des autobus. En outre, le gouvernement fédéral, le secteur canadien de la technologie des systèmes de transport urbain a réalisé sa première vente d'envergure à l'exportation hors des États-Unis, en avril 1981, lorsque la société Bombardier a signé un contrat de 180 millions de dollars pour la fabrication de voitures de métro destinées à la ville de Mexico. Le ministère a aussi participé activement aux discussions qui ont amené, en mars 1982, le

rtout porté sur le rendement général de l'industrie automobile, compte tenu de la fonction mondiale, et sur les mesures qui seraient être prises pour améliorer la situation. Le Canada a également profité de l'occasion pour aborder certaines questions qui le préoccupent, dont notamment son déficit commercial chapitre des pièces d'automobile et les niveaux d'investissement et de recherche et de développement au sein de l'industrie canadienne.

s fonctionnaires du ministère ont, de plus, dirigé la délégation canadienne qui a participé à discussions avec le Japon à la suite de la visite en juin 1981, le gouvernement japonais a annoncé que les exportations vers le Canada de voitures particulières seraient limitées à 4 215 unités durant la période d'avril 1981 à 1982, ce qui représenterait une baisse de 6 % par rapport aux exportations de 1980-1981. On a, en outre, entamé des pourparlers pour déterminer les mesures que le Japon devrait prendre pour la période subséquente, soit après le 31 mars 1982.

s fonctionnaires de la direction ont continué à collaborer étroitement avec les fabricants canadiens de véhicules automobiles afin de les aider dans leur effort de restructuration. Tel est le cas dans l'accord de janvier 1981, qui prévoit des modifications limitées aux exigences du Pacte de l'automobile touchant la société Ford, la direction a ajouté une deuxième équipe à son usine de montage d'Oakville, employant ainsi 200 travailleurs supplémentaires. En vertu de l'accord, cette usine sera transformée afin de pouvoir fabriquer, en 1983, les nouvelles voitures compactes à la direction ont eu aussi des consultations étroites avec les représentants de la société Chrysler Canada, notamment lorsque cette dernière a commencé à évaluer son nouveau programme de production et d'investissement au Canada, prévu aux termes de l'accord de février 1981, en vertu duquel le gouvernement fédéral s'engageait à fournir à la société jusqu'à 200 millions de dollars en subventions pour appuyer sa restructuration. Le plan de restructuration prévoit le transfert à l'usine de montage de Windsor de certaines activités de production de voitures et les activités de la société Chrysler et la population arrive de la société Chrysler et la restructuration visant à remplir ces activités par la production, en 1983, conformément à un mandat de la direction, des nouvelles fournitures à action avant 1-115.

octobre 1981, les représentants du ministère de l'Industrie, au nom du gouvernement fédéral, un accord avec la société Volkswagen Canada pour l'établissement d'une usine de pièces d'automobile.

bilie de 150 millions de dollars, à Barrie (Ontario) et qu'elle augmenterait sensiblement ses achats de pièces chez les fournisseurs indépendants canadiens; en retour, on offrirait à la société l'admission, en franchise de droits, sur le marché canadien de ses voitures et camionnettes. En vertu de l'accord, Volkswagen augmentera le niveau de la valeur ajoutée canadienne pour qu'il représente 85 % de ses ventes de véhicules automobiles au Canada. Cet accord permettra ainsi de créer quelque 1 500 emplois directs, soit 500 à l'usine de Volkswagen à Barrie et 1 000 environ chez les producteurs indépendants de pièces.

Pour favoriser l'adaptation du secteur des pièces d'automobile, le ministère de l'Industrie et du Commerce a annoncé, en janvier 1982, qu'un nouveau fonds de 25 millions de dollars serait réparti, au cours des prochains exercices, entre des producteurs indépendants de pièces d'automobile désignés aux termes du programme d'aide à la restructuration de certaines industries (PARI). Ce programme, qui relève du programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre (FAAIM), vise surtout à fournir une aide financière aux petites et moyennes entreprises désireuses d'entreprendre des projets d'immobilisations viables qui, autrement, ne pourraient être réalisés.

Enfin, la direction a continué à promouvoir l'actuellement l'exportation de véhicules automobiles et de pièces fabriqués au Canada. Des efforts considérables ont ainsi été déployés dans le domaine des exportations, puisque l'on a favorisé les coentreprises, participé à diverses foires commerciales, et participé à diverses foires commerciales en Europe, en Australie, aux États-Unis, au Japon et en Amérique du Sud. On a, en outre, continué de promouvoir le développement industriel et l'expansion des exportations au moyen des programmes du ministère, dont notamment le programme d'expansion des entreprises (PEE), le programme de production de l'industrie du matériel de défense (PPIMD) et le programme de développement des marchés d'exportation (PDME). Le programme de remise de droits de douane pour les pièces d'automobile, qui est administré par la direction, a également permis d'appuyer les initiatives touchant les exportations, prises dans ce secteur; grâce à ce programme, les exportations atteignent plus de 100 millions de dollars par année.

Les systèmes de transport ferroviaire

Puisque les fournisseurs de matériel ferroviaire ont, eux aussi, subi une forte baisse de la demande intérieure, le ministère a mis l'accent

des spécialistes en plans et devis de l'Allemagne de l'Ouest, de la Belgique, de l'Italie et du Japon ont été invités au Canada pour étudier la technique de construction des maisons à charpente et pour découvrir les sources d'approvisionnement éventuelles. Parmi les autres activités entreprises par la division au cours de l'exercice pour renforcer les relations avec les participants à la réunion semestrielle du Comité du Logement Canada-Japon et aux activités du Groupe d'étude Canada-CEE des produits forestiers, ainsi que le soutien qu'elle apporte aux programmes visant à atténuer les effets du secteur et à titre de citoyens actifs de l'industrie et avec les représentants de certaines firmes afin de soutenir les efforts des entreprises qui veulent mettre en valeur leur potentiel sur les marchés extérieurs.

Les pâtes et papiers

L'application du programme de modernisation de l'industrie des pâtes et papiers, annoncé en 1979, s'est poursuivie en 1981-1982. Ce programme mixte fédéral-provincial offre des stimulants à l'investissement au sein d'entreprises de produits primaires pour la modernisation de leurs installations de production. Des accords de participation ont été négociés avec le Québec, l'Ontario, le Nouveau-Brunswick, la Nouvelle-Écosse et Terre-Neuve. La Division des pâtes et papiers a contribué à la gestion de ce programme en effectuant des analyses, en faisant des recommandations et en donnant suite aux propositions de diverses sociétés. En outre, on a fait appel à ses compétences, en matière de technique et de commercialisation, pour l'étude et la mise en oeuvre de nouveaux projets de développement industriel, d'envergure au Canada, dans le secteur des pâtes et papiers, tant au chapitre des produits primaires qu'à celui de la transformation.

La division a continué de prendre part aux activités des comités internationaux de développement industriel qui sont chargés de promouvoir l'échange de connaissances techniques et de favoriser le commerce et les investissements entre les pays. Actuellement la CEE, le Japon, Cuba, l'U.R.S.S., l'Organisation de coopération et de développement économiques (OCDE) et le Conseil multinational, participent à de tels comités.

On a mis davantage l'accent sur les produits transformés et sur les matériaux d'emballage et l'on s'est surtout efforcé d'accroître les

LA DIRECTION DU TRANSPORT DE SURFACE

La Direction du transport de surface a entrepris un certain nombre d'activités d'envergure pour atténuer les difficultés qui ont confronté l'industrie en 1981-1982, pour exploiter ses possibilités de commercialisation, aider à sa reconstruction, promouvoir l'adaptation de la technologie et assurer sa viabilité à long terme et sa croissance dans le cadre de la concurrence mondiale.

Le programme global des activités de la direction comprend des rencontres internationales officielles, axées sur ce secteur très important de l'économie, et de nouvelles initiatives dans le cadre des programmes fédéraux et provinciaux d'améliorer la situation des producteurs canadiens sur les marchés tant intérieurs qu'extérieurs. La direction a, en outre, pris part à la négociation d'accords, avec les sociétés, pour accroître l'emploi et la production au Canada, participer à des foires commerciales internationales d'envergure et organiser des missions commerciales dans plusieurs pays du monde qui représentent de nouvelles possibilités.

L'industrie de l'automobile

Au cours de l'exercice, l'industrie nord-américaine de l'automobile a encore connu de graves difficultés. Elle a été durablement touchée par la récession économique qui sévit actuellement (notamment aux États-Unis, qui constitue son principal marché), de même que par d'importants changements technologiques et par l'intensification de la concurrence internationale.

Les consultations officielles entamées, en avril 1980, avec le gouvernement américain dans le cadre du Pacte de l'automobile, se sont poursuivies en 1981. Une série de rencontres, au niveau des hauts fonctionnaires, ont ainsi eu lieu, et des délégations canadiennes étaient dirigées par des fonctionnaires du MIC. Ces consultations ont

A l'occasion de la réunion annuelle du Comité du bois d'oeuvre de la Commission économique pour l'Europe, la division a préparé et présenté le document du Canada. Elle a, en outre, apporté son aide aux comités conjoints de coopération économique ou industrielle avec le Japon, Cuba, l'Algérie et la Norvège.

Les produits du bois manufacturés

Le déclin dans le secteur canadien de la construction résidentielle a incité plusieurs entreprises à chercher des débouchés aux États-Unis et outre-mer. L'importation accrue que la division a accordée à l'expansion des exportations provient surtout du fait que les entreprises canadiennes désirent de plus en plus étendre leurs marchés. La division a donc mis davantage l'accent sur les foires et les missions commerciales, de même que sur certaines études de marché. Ainsi, le gouvernement et les entreprises ont participé à des expositions commerciales, comme Batimat, à Paris, et le Woodworking Machinery Component Show, à Los Angeles, et des missions techniques de visiteurs intéressés à la construction des maisons à charpente sont venues au Canada. Des études du potentiel d'exportation des produits du bois manufacturés, effectuées dans le sud-est des États-Unis, dans la région du Michigan et dans le sud de la Californie, sont à l'origine d'études de marché très poussées qui ont, par la suite, permis aux fabricants canadiens de vendre leurs produits.

Grâce à ces efforts, les exportations canadiennes de produits du bois manufacturés ont atteint, en 1981, le niveau record de 454 millions de dollars, accélérant ainsi la croissance que l'industrie connaît depuis les années 70. Bien que les États-Unis demeurent le principal marché, les ventes ont augmenté en Europe de l'Ouest, au Japon et au Proche-Orient, malgré le ralentissement mondial des mises en chantier et un certain raffermissement du Dollar canadien par rapport aux autres principales devises employées dans les échanges commerciaux.

La division a tenté de tirer parti de l'ampleur croissante des préoccupations mondiales touchant la conservation de l'énergie et de la pénurie grandissante de bois à l'échelle internationale. Ainsi, sur plusieurs marchés clés, les entreprises neus sont-ils intéressés d'avantage à la technique canadienne de construction des maisons à charpente et à toute une gamme de produits canadiens du bois. Par suite de ces développements, des représentants de l'administration chargée d'appliquer le code du bâtiment, des architectes, des constructeurs, des représentants d'institution financières et de compagnies d'assurance et

ses, afin d'aider l'industrie à faire face à la situation.

division a continué de coordonner les activités visant à établir la position canadienne face à la réglementation de la CEE qui exige que chaque maison de bois de construction tendre vers la forme aux exigences phytosanitaires du pays d'exportation. De telles dispositions ont été acceptées par tous les pays membres de la CEE, sur la France, l'Italie et la Hollande. Les négociations à ce sujet se poursuivent.

cours de l'exercice, la division a organisé et conduit un bon nombre d'activités de promotion commerciale soigneusement choisies. Elle a ainsi su tirer parti des colloques à Rome et à l'Exposition universelle pour faire connaître aux utilisateurs éventuels les avantages qu'offrent les produits du bois et les systèmes de construction canadiens. Une mission d'acheteurs de bois de construction venue de la Californie a rencontré des producteurs de bois de charpente et des représentants des associations de la Colombie-tannique. Une mission italienne de produits du bois a rencontré des producteurs canadiens, puis a été de visiter des chantiers de construction et des installations de fabrication. Des fonctionnaires de la division ont participé à des colloques à l'Exposition de Chicago et à Detroit, lesquels visaient à accroître l'utilisation des produits du bois canadiens.

ant donné le fléchissement considérable des

chefs, l'industrie des produits du bois a ressenti la division de nombreuses demandes de renseignements et d'aide aux termes du programme d'expansion des entreprises (PEC). La division a, outre, largement contribué à l'étude des demandes présentées, en vertu de la loi sur les inventions au développement régional, au cours de l'expansion économique régionale. Les entreprises au terme du programme de développement ont été traitées de nombreuses demandes de renseignements et d'aide aux termes du programme d'exportation (PME), du programme d'adaptation de l'industrie et de la loi d'oeuvre (PAAIM) ou d'autres programmes.

provenance de divers pays dont le Japon, les Philippines, le Portugal, le Danemark et l'Égypte.

La division a entretenu des relations suivies avec les sociétés de charbonnage, les gouvernements provinciaux, les ambassades canadiennes et les ministères fédéraux en ce qui a trait aux perspectives actuelles de vente de charbon. Des consultations ont eu lieu avec les ministères fédéraux au sujet des crédits que le gouvernement fédéral se propose d'affecter à l'exploitation de gisements de charbon dans le nord-est de la Colombie-Britannique et au Cap-Breton.

L'aggravation de la controverse sur l'amiante en Europe et l'achèvement des préparatifs du Colloque mondial sur l'amiante (qui aura lieu à Montréal en mai 1982) ont imposé des demandes particulièrement

lourdes à la division en temps et en ressources

pour appuyer les activités de ce secteur industriel. Sous les auspices de l'Accord Canada/CEE de coopération industrielle, le gouvernement

canadien, le gouvernement québécois et la Commission économique pour l'Europe ont pris l'initiative d'organiser le colloque. Cette

réunion vise à étudier à fond les divers aspects de l'utilisation de l'amiante, à mieux équiper la communauté internationale et à déterminer les

possibilités de concilier les intérêts économiques et commerciaux avec les préoccupations sociales, y compris la qualité de la vie.

De nombreux échanges techniques, à un niveau élevé, ont eu lieu avec les gouvernements qui

s'intéressent à la question de l'amiante dont ceux de la France, de la Suède et de l'Allemagne de l'Ouest. En outre, le MIC a participé avec le

ministère de la Santé et du Bien-être social à l'organisation d'une mission de scientifiques canadiens en Allemagne de l'Ouest dans le but,

d'une part, d'échanger des renseignements et, d'autre part, d'examiner les projets de recherche sur l'amiante et la santé qui pourraient être

effectués de concert. Des experts-conseils ont été chargés d'étudier les données scientifiques disponibles sur l'amiante et la santé.

L'analyse de l'industrie et du marché

La Division de l'analyse de l'industrie et du

marché est chargée de coordonner les activités de coopération des industries canadiennes des métaux et des minéraux, avec celles des communautés

européennes (la France, l'Allemagne de l'Ouest et la Suède), du Japon et de l'Australie.

Le secrétariat du Groupe d'étude fédéral-provincial sur l'amiante se trouve dans les locaux de la division. Ce groupe a préparé un document

établissant la position du Canada sur la question de la réglementation de l'amiante, lequel après avoir reçu l'approbation de tous les ministères fédéraux intéressés à la question, a été envoyé à toutes les provinces pour être approuvé. Diverses mesures ont été établies et mises en application en vue de protéger les marchés d'exportation de l'amiante du Canada.

Une étude de l'incidence des facteurs de production sur la productivité des industries des métaux et minéraux a été menée à terme. On a également travaillé à l'élaboration, pour l'industrie des métaux, d'un régime d'impôt sur le revenu et l'exploitation minière destiné à l'Ontario.

Deux documents provisoires, *Metals and Minerals Processing: A Background Report* et *Canada's Non Ferrous Primary Metals Industries*, ont été

préparés dans le cadre de l'étude ministérielle de la transformation des métaux et minéraux au Canada. Des rencontres officielles ont aussi eu

lieu avec certaines provinces et certains représentants de l'industrie afin de connaître leurs premières impressions sur les principaux

résultats et conclusions de ces travaux.

Les produits primaires du bois

Financé et administré conjointement par le MIC, par le ministère de l'Expansion de l'Industrie et de la Petite entreprise de la Colombie-Britannique et par le Conseil des industries forestières de la Colombie-Britannique, le programme coopératif d'expansion des marchés extérieurs du Canada pour développer les marchés extérieurs du Canada pour le bois de construction tendre, le contre-plaqué, et les bardeaux. La Division des produits primaires du bois administre ce programme conjointement avec les deux autres participants. Les exportations du Canada outre-mer sont passées de 245 millions de dollars en 1970, soit avant la première étape du programme, à 1,4 milliard de dollars en 1980, pour descendre ensuite à 1,1 milliard de dollars en 1981. La contribution du gouvernement fédéral aux coûts du programme pour 1981-1982 s'est chiffrée à 1,5 million de dollars.

L'enquête de l'International Trade Commission (Commission des échanges internationaux) des États-Unis sur les exportations canadiennes de bois de construction tendre dans ce pays a constitué l'un des principaux problèmes confrontant l'industrie canadienne. La division a, par conséquent, collaboré étroitement avec les autres ministères fédéraux et provinciaux intéressés, ainsi qu'avec les groupes industriels

de divers secteurs de l'industrie canadienne, a visé des fondements technologiques avancés pour pouvoir être mis en application dans les fondrières de fer canadiennes. Les membres de la mission ont étudié plusieurs nouvelles techniques intéressantes dans les domaines de l'instauranta-tion, de la surveillance de la qualité et de la production automatisée.

La division a publié un rapport sur les capacités de l'industrie canadienne des pièces forgées en métaux ferreux. Préparé en collaboration avec les représentants de l'industrie, ce rapport constitue le tout premier ouvrage sur le secteur qui ait été publié jusqu'à maintenant. Un répertoire de l'industrie canadienne de la fonte de métaux ferreux, qui sera diffusé en 1982, est pratiquement terminé.

La division a effectué, conjointement avec les fabricants canadiens et les bureaux des délégués commerciaux à l'étranger, des études des marchés d'exportation pour les serres prefabriquées, les clôtures grillagées, les cylindres à gaz et divers produits métalliques d'architecture. Elle a, en outre, terminé des analyses portant sur les importations de chaînes à rouleaux, de poudre d'aluminium et de grenailles d'aluminium, lesquelles visaient à évaluer les possibilités qui s'offrent aux producteurs canadiens sur le marché intérieur.

Les minéraux industriels

Grâce aux efforts d'expansion des marchés déployés par la Division des minéraux industriels, l'industrie canadienne du charbon a très bien réussi à diversifier ses marchés en 1981. Elle a ainsi exporté ses produits dans 18 pays, dont sept en Europe, et elle a réalisé des ventes totales de 1,03 milliard de dollars. Si le Japon, le principal marché du Canada pour cette industrie, a absorbé 66 % des exportations canadiennes de charbon, il n'en demeure pas moins que l'on découvre, chaque année, de nouveaux débouchés en Europe et en Amérique latine. A l'heure actuelle, le charbon à coke destiné à l'industrie sidérurgique forme la majeure partie des exportations, mais de nombreux efforts ont été déployés pour développer le marché du charbon thermique. Des sociétés de la Colombie-Britannique et de l'Alberta fournissent actuellement 95 % de ces produits exportés.

Les efforts d'expansion des exportations de charbon se sont poursuivis et diversifiés, grâce à la venue de missions commerciales et aux visites de représentants de l'industrie du charbon en

Amérique centrale à prix réduits de dédouanement et d'autres questions d'intérêt commun. Enfin, au Canada, des réunions menées conjointement avec des fonctionnaires de plusieurs autres ministères et organisations gouvernementales ont eu à intervalles irréguliers pendant l'exercice usieurs de ces réunions portaient sur les problèmes que posent les importations d'acier bon

activités entourant la formation du groupe intergouvernemental d'étude du nickel ont progressé assez lentement, bien qu'il y ait eu des réunions pour élaborer un questionnaire statistique et pour arrêter le contenu d'un document d'information. Il a aussi été convenu que, au cours de 1982, le Canada et l'Australie communiqueraient avec les gouvernements d'environ 30 pays qui sont de gros producteurs ou consommateurs de nickel pour leur demander s'ils désirent faire partie de cet organisme et s'engagent à remplir régulièrement le questionnaire. Les plans provisoires du programme ont été établis.

La division a représenté le ministère au Comité interministériel du droit de la mer; elle a ainsi participé à la formulation des recommandations concernant les négociations.

La fabrication de produits en métal

En 1981-1982, des groupes de fabricants de produits en métal ont demandé à la Division de la fabrication de produits en métal de les aider à régler divers problèmes de nature commerciale. Comme il n'existe pas d'associations industrielles officielles dans ce secteur, la division a aidé à organiser des groupes d'étude de producteurs pour porter différents problèmes, tels le dumping, les importations primées, les modifications du système généralisé de préférences et les obstacles non tarifaires, suscités par les partenaires commerciaux du Canada.

En novembre 1981, une mission canadienne sur la technologie de la fonderie du fer a visité la France, l'Allemagne de l'Ouest, la Belgique et le Royaume-Uni. Dirigée par un fonctionnaire de la Division, la mission, formée de huit représentants

Quelques progrès ont été enregistrés en ce qui a trait à la collecte de données sur le fret aérien et à la production de rapports statistiques à cet égard, mais il faudra poursuivre cet effort durant le prochain exercice.

Les services de trafic

La Division des services de trafic a fait valoir le point de vue des maisons d'expédition canadiennes à l'occasion de la formulation et de la mise en application d'un certain nombre de politiques et elle a contribué à l'expansion de l'industrie des services de trafic. Les initiatives qu'elle a prises concernaient notamment la définition de la position du ministre sur la question de l'adoption du taux du Pas du Nord-du-Corbeau, l'évaluation, au fins de la fixation des droits de douane, des coûts de transport intérieur proposés par le gouvernement américain, les nouveaux règlements du gouvernement fédéral sur le transport des matières dangereuses et la réalisation d'études des conséquences probables qu'aurait, sur le commerce et l'industrie, la ratification, par le Canada, de la Convention des Nations unies sur le transport multimodal international.

Un Répertoire des services de transport

Le Répertoire a été tenu à jour et mis à la disposition des maisons d'expédition. Ce répertoire décrit 125 services de transport maritime à partir des ports canadiens vers les marchés d'exportation.

En participant à des réunions commerciales, la direction est intervenue pour résoudre un certain nombre de problèmes liés au transport, lesquels semblaient entraver le commerce canadien. En outre, la direction a mené plusieurs études axées sur des activités commerciales précises et portant sur le transport de produits et de marchandises.

Dans son effort pour faciliter le commerce, la direction a passé en revue les progrès et les réalisations de l'Organisation canadienne pour la simplification des procédures commerciales (COSIPRO) et elle a formulé des recommandations quant à la forme que devrait prendre à l'avenir l'aide gouvernementale à cette organisation. Le ministre d'État au Commerce a, depuis, annoncé la mise en oeuvre d'un programme de 1,6 million de dollars visant à faciliter le commerce. Un des points importants de ce nouveau programme est le transfert de COSIPRO au secteur privé, conformément à l'accord signé avec l'Association canadienne d'exportation, dans le but d'offrir à l'organisation des services de contrôle financiers et administratifs.

En 1981-1982, COSIPRO a travaillé en collaboration étroite avec le National Committee on Interna-

La sidérurgie

NATURELLES

LA DIRECTION DE LA TRANSFORMATION DES RICHESSES

Avec l'aide du ministre, COSIPRO a mis à l'épreuve, dans sept entreprises, son système d'information sur le commerce canadien. Les premiers résultats laissent voir les avantages suivants : une baisse de 30 % du nombre d'heures-personnes que nécessite la préparation des documents, une réduction des coûts d'impression et un accroissement de la productivité au sein du personnel de bureau.

20 millions de dollars par année.

national Trade Documentation des États-Unis et elle a réussi à faire annuler une facture spéciale de douanes américaines, ce qui devrait faire économiser aux exportateurs canadiens près de

1981-1982, la Division de la sidérurgie a reçu de En raison de la faiblesse de la demande d'acier et de l'industrie de la métallurgie de l'acier, des normes demandées d'aide provenant des acheteurs de l'industrie de l'acier, de part et d'autre, des fabricants de produits en acier, de part et d'autre, des associations et d'instituts privés, ainsi que d'investisseurs provinciaux, fédéraux et internationaux.

En collaboration avec le Service des délégués commerciaux, la division a dressé la liste des nombreuses expositions et foires commerciales qui avaient lieu à l'échelle mondiale. Elle voulait, par ce geste, encourager les fabricants de bâtiments d'acier à y participer pour qu'ils soient ainsi mieux en mesure de pénétrer les marchés d'exportation. La division a organisé une mission à l'étranger pour permettre à des professeurs d'universités canadiennes de visiter des instituts de recherche et des aciéries en Allemagne de l'Ouest, dans le cadre d'un programme d'échanges en matière de recherche entre le Canada et la Communauté économique européenne (CEE).

A l'échelle internationale également, le chef de la division a été élu président du groupe d'étude du Comité de l'acier de l'Organisation de coopération et de développement économiques (OCDE) et il a assisté à plusieurs réunions du comité portant sur la crise qui sévit sur les marchés mondiaux de l'acier. La division a, en outre, représenté le Canada à la réunion annuelle du Comité de l'acier de la Commission économique pour l'Europe, tenue à Genève à l'automne de 1981. Durant tout l'exercice, des consultations ont eu lieu avec les représentants du gouvernement américain et les membres du Groupe consultatif de l'industrie sidérurgique (GCIS) pour examiner le

du transport international et aux initiatives des organisations multilatérales. Toutes les divisions ont travaillé en collaboration étroite avec les particuliers et les sociétés qui s'occupent d'expédition, ainsi qu'avec les associations de cette industrie, pour tenter de résoudre certains problèmes que connaissent à l'échelon tant national qu'international les services de transport, et pour trouver et exploiter de nouveaux débouchés. Les divisions ont largement participé aux discussions, axées sur les politiques, qui touchaient le commerce, le tourisme et l'industrie des services de transport. Les sections suivantes offrent un aperçu des réalisations des différentes divisions et des fonctions qu'elles exercent.

Le transport maritime

La Division du transport maritime a participé aux études menées par la Conférence des Nations unies sur le commerce et le développement (CNUCED) et par l'Organisation de coopération et de développement économiques (OCDE), des initiatives développées internationales d'expédition qui pourraient avoir une incidence sur le commerce canadien. Au nombre des sujets abordés figuraient le partage des cargaisons sur les vapeurs et les paquebots de grande ligne, les modalités d'enregistrement des navires, l'abandon graduel des pavillons de complaisance et la modernisation des contrats d'assurance maritime.

Le transport aérien

La Division du transport aérien a continué, en participant au règlement d'un certain nombre de questions liées aux politiques aériennes, à se monter très attentivement aux intérêts des voyageurs d'affaires, des maisons d'expédition et de l'industrie touristique. Ses activités touchaient notamment des négociations sur les services aériens entre le Canada et les États-Unis, la politique relative aux transporteurs aériens intérieurs, les marchés des services aériens entre le Canada et Singapour et le Canada et l'Inde, le réseau d'aéroports de la région de Montréal, les services d'ADAC entre Toronto, Montréal et Ottawa, la vente de Nordair et un examen de la politique d'aviation civile internationale. Dans ce dernier cas, la division a préparé un document d'étude sur l'importance du fret aérien au sein du réseau international des services aériens.

Des études ont été entreprises pour évaluer la nécessité et l'opportunité des vols directs entre le Canada et certains pays. Pour évaluer le potentiel que présentent de tels services aériens, on s'est fondé sur des données relatives aux services actuels, au commerce et au tourisme, au trafic actuel (tant au départ qu'à destination) et aux taux de croissance des années passées.

1981-1982, la division a entrepris un programme ergique de liaison avec les associations de services de consultation, dont notamment l'Association des ingénieurs-conseils du Canada, Institut royal d'architecture du Canada, Association canadienne des agronomes-conseils la Canadian Association of Hydrographic Ocean Surveying Industries.

La division a participé à un certain nombre de colloques sur l'expansion de l'industrie et du commerce. Elle a ainsi organisé, en collaboration avec le Centre d'études architecturales de l'Université Concordia de Montréal, un symposium international sur la conception d'immeubles systématique par ordinateur (CIVAD) pour sensibiliser les gens aux récents progrès internationaux aux registres dans ce domaine et aux éventuels avantages que pourra susciter l'adoption, par l'industrie canadienne de la construction, de cette nouvelle technologie.

Un appuyer les efforts d'exportation déployés par les experts-conseils canadiens, la division a encouragé, à Washington, des représentants de la banque mondiale et de la Banque interaméricaine de développement et elle a tenu, à New York, des réunions avec les responsables du programme des Nations unies pour le développement. La division a organisé une mission d'exploration, de gestion et de logistique, qui est rendue à Hong-kong, en Indonésie et à Singapour. Cette mission a étudié le potentiel d'exportation et les meilleures approches à utiliser pour y pénétrer.

e part importante des activités de la division s'agit d'exécuter le programme de développement des marchés d'exportation (PDME) et à fournir aux experts-conseils des comptes rendus sur les marchés qu'offrent les marchés étrangers. Au cours de l'exercice, la division a reçu plus de demandes dans le cadre du PDME et elle a continué à l'attention des experts-conseils près de 0 avis de projets.

DIRECTION DES SERVICES DE TRANSPORT

1981-1982, la Direction des services de transport a continué de s'intéresser à l'évolution

au début de 1982-1983, et déjà les premiers contacts avec les ministères provinciaux de l'industrie ont été établis.

La division a fourni des services de secrétariat au Comité consultatif des services de distribution.

La parution, au cours de l'exercice, de l'ouvrage

Canada's Trade Challenge, le rapport du Comité

parlementaire d'une société nationale du commerce, s'est révélée d'une grande importance pour le

secteur des maisons de commerce. La division a

pris en compte la recommandation du comité

parlementaire voulant que davantage d'efforts

soient déployés pour aider le secteur privé dans ce domaine. Au nombre des initiatives entreprises

figuraient l'envoi en Australie d'une mission,

axée sur les maisons de commerce, pour améliorer la représentation du Canada dans ce pays,

l'organisation, à Ottawa, d'un colloque réunissant

300 gens d'affaires, hauts fonctionnaires et

cadres supérieurs du secteur privé, la publication d'un répertoire des maisons de commerce et sa

diffusion dans les milieux d'affaires canadiens en

vue de focaliser l'attention sur la viguerie du

secteur et l'extraordinaire valeur en dollars qui

en résulte. Les estimations indiquent que les

maisons de commerce ont effectué pour 11 milliards

de dollars de transactions en 1980.

LA DIRECTION DE LA CONSTRUCTION ET DES SERVICES DE

CONSULTATION

La construction

En 1981-1982, la Division de la construction a continué d'orienter ses efforts vers un accroissement de la productivité et de l'efficacité des industries de la construction, des services immobiliers et des sources d'énergie renouvelables et vers une amélioration de leur rendement sur les marchés d'exportation.

Les principales activités de la division

englobaient :

• la tenue, à Vancouver, à Calgary, à Saskatoon,

à Saint-Jean (N.-B.) et à Halifax, de colloques

sur la manipulation des matériaux en vue

d'améliorer la productivité sur les chantiers

et de mettre au point de nouveaux produits et

procédés destinés à l'industrie de la

construction, grâce au programme d'expansion

des entreprises (PCE);

Les services de consultation

La Division des services de consultation a continué à aider l'industrie en vue de lui permettre d'atteindre son potentiel de croissance, de surmonter les difficultés et de promouvoir davantage les exportations de services canadiens de consultation.

• L'achèvement d'une étude de la construction dans le Nord canadien (au-delà de 60° de latitude), laquelle sera examinée par le Conseil pour l'expansion de l'industrie de la construction, qui l'intégrera à son analyse d'ensemble de la construction au Canada dans les années 80;

• La révision du Répertoire des exportateurs de l'industrie de la construction et sa diffusion dans les bureaux des délégués commerciaux canadiens à l'étranger, ainsi qu'aux entreprises intéressées au Canada et dans les autres pays;

• L'envoi d'une mission commerciale, composée de représentants des firmes de la construction, à Pérou, en Equateur et en Colombie, dont les résultats positifs comprennent un contrat accordé sur-le-champ à l'une des entreprises et des perspectives encourageantes pour les autres membres de la mission, ainsi que des contrats escomptés d'au moins 22 millions de dollars,

• L'achèvement d'une étude des débouchés d'exportation provenant des activités des promoteurs immobiliers canadiens sur le marché américain;

• La coordination des activités du ministère

des domaines des systèmes de sources d'énergie

renouvelables et de la conservation de

l'énergie dans les immunités. Au nombre de

initiatives figurait la représentation du

ministère au sein de plusieurs comités

industriels et interministériels, la

participation aux réunions annuelles de la

Société d'énergie solaire du Canada Inc. et de

l'Association des industries solaires du

Canada, l'organisation d'une mission

commerciale en Colombie, la coordination des

expositions canadiennes à la Conférence des

Nations unies sur les énergies renouvelables,

sur l'énergie solaire, à Brighthon (Angleterre)

la parution d'une brochure sur l'énergie

solaire au Canada, à laquelle s'est ajoutée un

étude du marché des exportations de matériaux

solaire aux États-Unis et dans les Antilles.

L'intention des organismes coopératifs, une stratégie des marchés d'exportation. Des répercutoires des exportateurs de gros; on prévoit y apporter des améliorations en 1982-1983.

La division a participé à certaines expositions techniques, axées sur la gestion de l'entreprise et portant plus particulièrement sur l'exploitation des pharmacies de détail et sur l'expansion des magasins d'articles de sport. Des travaux ont été poursuivis sur la mise au point d'un système amélioré de mesure de la productivité pour le commerce de détail, plusieurs détaillants ayant participé à l'essai d'un tout nouveau système.

Les développements récents touchant l'utilisation d'une nouvelle technologie dans les services de distribution ont été suivis de près. La division, dans le cadre du programme d'études sur l'innovation technique, a contribué à une étude effectuée par une université canadienne et portant sur les discussions que la technologie électronique, au point de vente, peut avoir sur la commercialisation.

La division a amélioré ses compétences et accru ses activités pour offrir de l'aide tant aux entreprises du secteur privé qu'aux personnes désireuses d'obtenir des renseignements sur les réseaux de distribution au Canada ou d'avoir des contacts avec certains types de maisons de distribution.

Les services de mise en marché

La Division des services de mise en marché s'est faite le porte-parole du gouvernement canadien à la réunion annuelle de l'International Franchise Association et elle continue de renforcer, avec l'Association de franchisage du Japon, les liens étroits noués lors de la très profitable mission commerciale de franchisage envoyée au Japon en mars 1981.

L'intérêt considérable porté aux marchés des pays de la ceinture du Pacifique est à l'origine d'une mission commerciale de franchisage en Australie et en Nouvelle-Zélande en mars 1982. Les premières ventes permettent de croire que cette mission commerciale de franchisage est la plus réussie jusqu'à maintenant, et la direction a établi une solide base de renseignements destinée à venir en aide aux franchisés canadiens dans leurs efforts d'exportation dans cette région du monde.

La division, en coopération avec la Section des possibilités de licences du ministère, a amorcé la préparation d'un manuel, à l'intention des fabricants locaux et étrangers, sur l'octroi de licences. Un colloque pilote devrait avoir lieu

recommandations du rapport et de préparer une réponse officielle du gouvernement. La revue publiée en temps et lieu après avoir consulté les gouvernements provinciaux et le

octobre 1981, le bureau a publié un répertoire de projets d'envergure alors en cours ou qui vient être entreprise au Canada avant la fin de l'année. Il a également commencé à élaborer une stratégie de mise au point des produits et d'expansion des entreprises en vue de satisfaire aux besoins commerciaux des projets d'exploitation pétrolière et gazière au large de l'est et sur les terres de l'état.

DIRECTION GÉNÉRALE DES INDUSTRIES DE SERVICES

En du secteur des entreprises canadiennes de services, la Direction générale des industries de services a d'ailleurs mis l'accent, en 1981-1982, l'aide directe et les conseils afin de promouvoir les probabilités que connaît actuellement l'économie. Les activités entreprises touchaient le commerce de gros et de détail, les services de transport, la construction, le domaine des services d'énergie renouvelables, les bureaux d'experts-conseils, ainsi que divers moyens de transport et de services de trafic.

commerce de gros et de détail

Division du commerce de gros et de détail a tenu des services de secrétariat au Comité consultatif des services de distribution. Créé en 1981, le comité, formé de quelques représentants du secteur du commerce de gros et de détail, a été mis sur pied pour analyser les questions qui intéressent grandement le secteur des services de distribution et pour formuler, à l'intention du gouvernement, des recommandations à sujet. Le comité doit présenter au ministère, avant 1982, son rapport final, qui comprend recommandations.

division a redoublé ses efforts pour faire en sorte que les distributeurs canadiens pénètrent davantage les marchés internationaux. Elle a tenu une réunion, au nom du ministère, la Assemblée générale de la World Federation of Precast/Prestressed Concrete Manufacturers, qui a eu lieu au Canada en octobre 1981 et à laquelle ont participé 26 pays. Dans le cadre du programme d'exportation des marchés d'exportation (PDME), la division a organisé une exposition des rencontres internationales pour faire mieux connaître le secteur canadien de l'édition. Elle a également entrepris une étude pour élaborer, à

- L'approbation de 211 demandes présentées dans le cadre du programme de développement des marchés d'exportation (PDME), ce qui devrait engendrer 338 millions de dollars de ventes à l'exportation;

- des mesures en vue de favoriser la participation de l'industrie, et de ses représentants, à 13 foires et à 12 missions commerciales qui ont engendré des ventes sur place de 13 millions de dollars et qui devraient permettre de réaliser des ventes ultérieures de 142 millions de dollars; au nombre de ces activités figuraient la participation de l'industrie aux missions de promotion de production de pâtes et de matériel de papeterie, en France, de même qu'aux expositions de matériel d'exploitation minière, à Acapulco, de matériel d'exploitation pétrolière et gazière, à Mexico, et de machines à emballier, en Allemagne de l'Ouest;

- la participation à des missions et à des activités spéciales de coopération commerciale et industrielle dont une mission dans les pays de la Communauté économique européenne (CEE) pour promouvoir la vente d'énergie, des colloques sur l'énergie nucléaire en Yougoslavie et au Mexique et d'autres sur le matériel agricole en Australie.

LE BUREAU DES RETOMBÉES INDUSTRIELLES ET RÉGIONALES

Le Bureau des retombées industrielles et régionales a été créé, en août 1981, pour aider les entreprises et les travailleurs canadiens de toutes les régions à profiter pleinement des possibilités exceptionnelles que leur offriront les projets d'envergure qui seront réalisés au Canada au cours des prochaines décennies. Depuis sa création, le bureau a désigné comme prioritaires quelque 34 projets d'envergure, d'une valeur globale de 103 milliards de dollars. Il a établi et mis en application diverses méthodes afin que les entreprises canadiennes de fabrication et de services qui sont concurrentielles aient pleinement accès à ces projets et à d'autres.

Le bureau est chargé de la consultation et des échanges avec le secteur privé sur les questions industrielles et régionales liées aux principaux projets. Il collabore étroitement avec les gouvernements provinciaux en ce qui a trait aux retombées industrielles, coordonne les activités du gouvernement fédéral en la matière et, par l'entremise de l'Administration du pétrole et du gaz des terres du Canada, conseille le gouvernement fédéral au sujet des dispositions

Le bureau consulte les propriétaires et les promoteurs de projets d'envergure pour faire en sorte que les entreprises canadiennes soient pleinement exploitées "plètement et équitablement" dans les possibilités qu'offrent de tels projets. Il encourage les promoteurs des projets à établir des politiques d'achat conformes aux objectifs du gouvernement en matière de retombées industrielles et régionales et à mettre en place des structures organisationnelles convenables pour la mise en application de ces politiques. Il contribue à déterminer les secteurs où la capacité canadienne est la plus forte et la plus concurrentielle, de même que les secteurs qui, du fait du potentiel qu'ils présentent, méritent d'être mis en valeur par les promoteurs.

Le bureau organise et dirige les réunions du Comité des retombées industrielles et régionales des mégaprojets, tout en lui fournissant les analyses et le soutien administratif nécessaires Composés de représentants des gouvernements provinciaux, des administrations territoriales et d'autres ministères fédéraux clés, ce comité offre une tribune vaste pour la consultation avec les promoteurs des projets. Créé, lui aussi, en août 1981, il remplace l'ancien Comité consultatif des retombées industrielles.

Au cours de l'exercice, le comité a tenu 10 réunions avec des promoteurs de travaux d'envergure. Les projets examinés portaient notamment sur l'exploitation pétrolière et gazière dans la mer de Beaufort, dans l'Arctique et au large de la côte Est, ainsi que sur un plan hydro-électrique. Ces réunions, ainsi que de nombreuses rencontres officielles entre les fonctionnaires du bureau et les promoteurs de projets d'envergure, ont permis d'accroître les possibilités des fournisseurs canadiens. L'instauration du bureau, un nombre croissant de promoteurs ont commencé à établir des politiques de achat qui tiennent compte de la capacité de production des entreprises canadiennes. Le bureau a également commencé l'analyse des plans de retombées industrielles d'entreprises qui négocient des accords d'exploitation avec l'Administration du pétrole et du gaz des terres du Canada.

Le groupe d'étude des grands projets a publié son rapport en juin 1981. Composé de 76 cadres supérieurs, représentant le monde des affaires et du travail, ce groupe indépendant a été créé en 1978, avec l'aide du ministère, pour examiner les projets d'envergure au Canada.

Le Bureau des retombées industrielles et régionales a été chargé d'étudier les

- des initiatives visant des arrangements relatifs à la rationalisation et à la spécialisation de la fabrication de produits comme la matière d'exploitation forestière, les pompes à schlam, les radiateurs autonomes, les perforatrices légères pour l'extraction minière et les fours industriels;
- des évaluations techniques et commerciales portant sur neuf projets, y compris de nouvelles possibilités de production liées au matériel de conduites de transfert pour l'industrie automobile, au matériel de soudure et de moulage sous pression, dans le cadre du programme d'adaptation industrielle axé sur les collectivités, un volet du PAAIM, évaluations qui ont amené l'approbation d'une aide directe de quelque 1,4 million de dollars.

L'innovation

La direction a continué, en ayant recours aux dispositions des programmes et autres stimulants du ministère, de favoriser activement l'innovation dans le domaine de la conception et de la mise au point de machines au Canada. En 1981-1982, la direction a évalué 45 nouvelles demandes présentées dans le cadre du programme d'expansion des entreprises et en a retenu 13 qui représentaient une aide de 28,2 millions de dollars. On estime que les projets autorisés permettront d'accroître les ventes de 943 millions de dollars et de créer 2 612 autres emplois.

L'analyse et l'élaboration de politiques

Au nombre des principales activités entreprises dans le domaine de l'analyse et de l'élaboration de politiques en 1981-1982 figuraient un profil complet de l'industrie du matériel minier spécialisé au Canada, une analyse visant à définir une série d'objectifs stratégiques pour guider les efforts que déploiera le ministère en vue de favoriser l'expansion de l'industrie au cours des années 80, de même que plusieurs séances d'information sur quelques secteurs particuliers dont ceux du matériel de production de pâtes et papiers et du matériel d'exploitation pétrolière et gazière.

La promotion des exportations

La Direction de la machine à un programme dynamique de promotion et de coopération visant à aider les entreprises à tirer davantage profit des marchés d'exportation. En 1981-1982, les activités du programme englobaient :

une aide directe au Comité des retombées industrielles en vue de déterminer les débouchés de certains produits, les lacunes dans les gammes de produits, les secteurs saturés par l'offre, les nouvelles techniques dans le domaine du matériel et l'investissement qu'exige la participation maximale des fabricants canadiens de machines aux grands projets d'exploitation des ressources prévis pour les quelques années à venir;

un appui technique à l'approvisionnement et Services Canada dans l'évaluation de tous les achats de machines et de matériel supérieurs à 2 millions de dollars permettant d'identifier les fabricants canadiens capables de répondre à de telles demandes;

accélération de la récession, au cours du dixième semestre, a entraîné l'aggravation des problèmes d'adaptation pour certaines entreprises, notamment dans le secteur des machines agricoles et matériel de construction. Parallèlement, le format commercial qui a suivi les négociations commerciales multilatérales (NCM) a été propice à création de nouvelles possibilités pour la rationalisation de la production et à des arrangements de spécialisation dans plusieurs secteurs, tant au niveau de la branche qu'à l'intérieur de l'entreprise. Les ressources de la direction ont donc été de plus en plus sollicitées pour aider à la résolution de ces problèmes d'adaptation. En 1981-1982, les activités globales :

des séances d'information, des consultations et des activités de surveillance liées à l'appui du gouvernement fédéral à plusieurs fabricants de machines qui, du fait d'une capitalisation inadéquate, doivent procéder à une réorganisation et à une restructuration d'envergure; de même que la préparation de sept soumissions au Comité d'approbation impliquant 18 millions de dollars en garanties de prêts subéquemment autorisées dans le cadre du programme d'expansion des entreprises;

LA DIRECTION DE LA MACHINERIE

La Direction de la machinerie a offert, en 1981-1982, un programme élargi d'aide financière pour les entreprises engagées dans la mise au point de nouveaux produits, l'innovation et la commercialisation des exportations. Elle a accru le niveau d'aide qu'elle accorde aux sociétés pour la recherche de nouveaux débouchés sur les marchés tant intérieurs qu'extérieurs et a procédé à l'analyse et à l'élaboration de politiques d'industries particulières. Du fait de la détérioration du marché dans plusieurs secteurs de la production, on a fait davantage appel aux ressources de la direction pour aider à résoudre les problèmes d'adaptation que connaissent plusieurs grandes entreprises de l'industrie.

L'industrie canadienne de la machinerie comprend environ 2 000 firmes employant 142 000 personnes, qui produisent un large éventail de machines et de matériel destinés aux industries de la transformation des ressources, de la fabrication et des services. Au cours de l'exercice, la production de l'industrie a été évaluée à 10,6 milliards de dollars dont 4,2 milliards de dollars en ventes à l'exportation. Le marché intérieur de la machinerie a, pour sa part, atteint 19 milliards de dollars en 1981-1982, les entreprises canadiennes du matériel y contribuant pour 6,4 milliards de dollars (34 %) et les importations représentant 12,3 milliards de dollars (66 %).

Alors que, depuis 1970, la production de l'industrie s'est accrue à un taux annuel moyen de 13 %, elle n'a que fort peu augmenté entre 1980-1981 et 1981-1982 en raison de la réduction soudaine des investissements en capital par les entreprises utilisatrices et du fléchissement des marchés des machines agricoles, du matériel de construction et d'exploitation forestière. De nouvelles baisses s'annoncent pour 1982-1983, du fait que l'industrie est touchée de plus en plus sérieusement par la récession économique générale et prolongée et que ses canaux de commandes sont vides alors qu'ils s'étendent à la suite des fortes dépenses en investissements productif effectuées au cours des trois années précédentes.

Les sections suivantes offrent un aperçu des principales sphères d'activité de la Direction de la machinerie en 1981-1982.

L'administration du programme de la machinerie

L'administration du programme de la machinerie est demeurée une activité importante de la direction

au cours de l'exercice. Le programme est conçu pour stimuler l'expansion industrielle et il comporte le double objectif suivant :

- encourager les fabricants de machines à tirer le maximum d'avantages des dispositions tarifaires;
- aider les utilisateurs de machines à acheter le matériel de production perfectionné au prix le plus bas possible, grâce à des remises de droits sur le matériel non fabriqué au Canada.

La Direction de la machinerie a entrepris d'examiner la capacité de fabrication de machines au Canada afin d'être davantage en mesure d'évaluer, sur les plans technique et commercial, les demandes de remises de droits présentées par l'industrie.

Au cours de l'exercice, la direction a étudié 28 755 demandes de remises de droits, couvrant 4,8 milliards de dollars d'importations. Les remises de droits offertes sur du matériel non fabriqué au Canada ont permis aux entreprises canadiennes d'économiser 400 millions de dollars en coûts d'immobilisation. Cela comprendait les remises de droits sur des biens d'équipement et d'autres composants de production se rapportant à de nouvelles capacités de fabrication, aux installations de chaînes de production intégrées et aux commandes de produits de l'automobile à l'exportation. De ce fait, le chiffre de la production canadienne a pu s'accroître de un milliard de dollars, et l'on évalue à 11 000 le nombre d'emplois directs qui auraient ainsi été créés.

Le programme a aussi permis d'aider 29 entreprises à amorcer la production de 31 nouveaux produits de machinerie jusqu'aux importations. Cette nouvelle activité manufacturière représente une production annuelle de 185 millions de dollars et près de 1 500 nouveaux emplois. Au nombre de ces nouveaux produits figuraient, en 1981-1982, des machines de nettoyage à sec, du matériel de transformation de la pâte à papier, des collecteurs de vapeur de soudure et des rouleaux compresseurs vibrants utilisés pour la construction de routes.

Les retombées industrielles des débouchés offerts par le marché intérieur

En 1981-1982, la direction a participé à un programme élargi destiné à exploiter les débouchés qu'offre le marché et à susciter, chez les fournisseurs canadiens de machines et de matériel, les capacités de participer à la réalisation de plusieurs nouveaux et éventuels projets et de programmes d'investissement au pays. Cette activité englobait :

tionaux sont tous conçus et exécutés dans le cadre des plans canadiens d'expansion des marchés de l'industrie des céréales et des oléagineux. L'institut est financé conjointement par le MIC et par la Commission canadienne du blé.

Le Bureau de la commercialisation des céréales a paré des missions axées sur les oléagineux, venues du Mexique et de la République populaire chinoise, ainsi que des colloques techniques qui ont été tenus en Inde, au Pakistan, au Venezuela, au Chili, en Roumanie, en Yougoslavie et au Japon. Menées conjointement avec les colloques au Japon, des consultations annuelles ont eu lieu à Tokyo entre des représentants de l'industrie et des gouvernements canadiens et japonais. Au nom de trois broyeurs de canola de l'Ouest, la Corporation commerciale canadienne a conclu, avec l'organisme d'achat algérien ONACO, un marché en vertu duquel on pourrait fournir jusqu'à 96 000 tonnes d'huile de canola, soit, selon les évaluations, des ventes de quelque 66 millions de dollars. C'est grâce aux efforts de promotion commerciale et aux colloques techniques tenus par le bureau que ce contrat a pu être ratifié.

L'Administration chargée de la stabilisation concernant le grain de l'Ouest a signalé que les recettes brutes des ventes de céréales des Prairies, admissibles pour l'année 1981, s'élèvent à plus de 6,2 milliards de dollars, ce qui représente une augmentation de 1,5 milliard de dollars (32 %) par rapport à celles de l'année précédente. Du fait de cette hausse des recettes brutes, aucun versement n'était censé être effectué à même le fonds en 1981. Conformément à la loi de stabilisation concernant le grain de l'Ouest, le ministre contribue au fonds lorsque la valeur des recettes brutes le justifie.

Depuis décembre 1976, le ministère aide l'industrie de la transformation du canola de l'Ouest canadien à s'adapter aux tarifs minimaux compensatoires de transport ferroviaire pour l'huile et la farine de canola. L'aide financière accordée aux termes de ce programme, qui prendra fin le 31 mars 1983, ne peut dépasser 3 millions de dollars par année.

Grâce à l'aide du programme de développement des marchés d'exportation (PDME), les données techniques sur l'huile et la farine de canola ont été mises à jour et traduites en espagnol, en allemand, en chinois et en japonais. En outre, en vertu du même programme, un expert canadien en raffinage de l'huile s'est rendu au Pakistan pour fournir une aide technique dans le domaine du raffinage de l'huile de canola utilisée comme venaspace.

principaux oléagineux et produits : 2,7 millions de tonnes (985 millions de dollars), comparativement à 2,5 millions de tonnes en 1980.

bureau a paré deux missions de visiteurs et des colloques techniques dans des pays actuels - importateurs ou qui pourraient le devenir. A l'information aux entreprises canadiennes qui envisagent de visiter les pays, ils représentent des marchés éventuels. Au nombre des réalisations marquantes de l'exercice figurait un accord à long terme avec l'U.R.S.S., signé par la Commission canadienne du blé, pour la vente d'au moins 25 millions de tonnes entre le 1^{er} juillet 1986 ainsi qu'un marché d'huile de canola conclu avec l'Algérie. Dans le but d'assurer une coopération soutenue, des participants ont été entamés avec les principaux exportateurs de céréales en vue d'examiner l'évolution du commerce international.

capacité de traitement du canola a continué de croître grâce à l'agrandissement des installations déjà en place et à la construction de nouveaux établissements. Au Manitoba, une nouvelle usine de broyage, d'une capacité quotidienne de 600 tonnes, ouvrira ses portes en octobre 1982, tandis qu'une autre, de même capacité, devrait être mise en exploitation au début de 1983 dans l'est du Canada. Le broyage des oléagineux a représenté près de 1,93 million de tonnes d'huile.

des paiements versés aux producteurs, dans le cadre du programme des paiements anticipés pour les céréales des Prairies, ont atteint un niveau record de 344 millions de dollars, soit presque trois fois celui de l'année précédente. Etant donné les taux d'intérêt élevés et les montants importants avancés, les coûts en intérêts pour l'état ont atteint 12,7 millions de dollars, comparativement à 2,7 millions de dollars pendant l'année précédente.

usine pilote de la PDS Pilot Plant Corporation, il procède au traitement des protéines, des vitamines et de l'amidon, a mis au point une nouvelle technique devant se révéler fort utile à l'industrie canadienne de la transformation des oléagineux, puisqu'elle permettra aux entreprises de ce secteur de raffiner davantage leur produit à des coûts inférieurs à la normale. Pour ses frais d'exploitation, la société a reçu du gouvernement une aide financière de 600 000 \$.

Le cours de l'exercice, l'Institut international du Canada pour le grain a offert 15 cours dont 11 s'adressaient à des participants étrangers et 4, à des Canadiens. Ces programmes interna-

Les produits des pêches

En 1981-1982, la Division des produits des pêches a coordonné la participation de l'industrie de la pêche à plusieurs missions et expositions, ou à

des projets de promotion commerciale. Au nombre de ces activités figuraient une mission en Australie et en Nouvelle-Zélande, en novembre 1981, et une mission de vente, en février 1982, en Égypte, au Koweït, en Arabie saoudite et en Israël, ainsi que la visite au Canada, en septembre 1981, de missions d'acheteurs du Sud-Est asiatique, de la Grèce, de l'Australie et de la Nouvelle-Zélande.

L'exposition canadienne présentée par le ministère, qui fut présentée lors du National Restaurant Hotel-Motel Show (NRHS) de Chicago, qui a eu lieu du 16 au 20 mai 1981, constitue l'une des activités marquantes de l'exercice dans ce domaine. L'accueil qui lui a été réservé a été très favorable. Les sociétés de possibilités de transformation des produits des pêches étaient bien représentées dans les expositions

canadiennes, parvenues par le ministère, qui ont été mises sur pied lors des salons internationaux de produits alimentaires. Quinze de ces sociétés ont participé à l'exposition Anuga 81 de Cologne, où elles ont réalisé des ventes de quelque 15 millions de dollars.

Les activités de promotion axées sur le consommateur qui ont été organisées au cours de l'exercice comprennent des promotions dans les magasins (par exemple, celle de la chaîne Seiyu, à Tokyo) et des programmes de commercialisation collective (par exemple, celui de Chicago, du 1^{er} au 13 février 1982). La promotion à Chicago visait à inciter les établissements de vente au détail et de distribution, les commerçants institutionnels et le consommateur à acheter plus de poisson canadien. On a préparé, à cette occasion, d'une part, du matériel de publicité sur le lieu de vente, et, d'autre part, de la publicité dans la presse et à la radio, des recueils de recettes et des nappes. Ces dernières activités de promotion ont remplacé la participation du Canada à la promotion organisée par la North Atlantic Seafood Association.

Même si les exportations totales de produits canadiens des pêches ont augmenté, passant de 1,276 milliard de dollars en 1980 à 1,520 milliard en 1981, l'industrie canadienne de la pêche fait actuellement face à de graves difficultés économiques à cause de la diminution de la marge coût/prix attribuable à l'affaiblissement des marchés, des désavantages que présente le taux de change, de la hausse des frais d'exploitation, de l'obsolescence de la technique utilisée et du

LE BUREAU DE LA COMMERCIALISATION DES CÉRÉALES

Le Bureau de la commercialisation des céréales a élargi le champ de ses activités dans tous les secteurs en 1981-1982. Les exportations des céréales et oléagineux d'importance, de même que celles de leurs produits, sont passées de 5,2 milliards de dollars en 1980 à 5,9 milliards de dollars en 1981.

Les exportations des principales céréales et de leurs produits ont atteint les niveaux suivants en 1981 :

- blé : 15,5 millions de t (3,7 milliards de dollars);
- orge : 4,8 millions de t (843 millions de dollars);
- maïs : 1,2 million de t (218 millions de dollars);
- seigle : 450 000 t (96 millions de dollars);
- avoine : 80 000 t (10 millions de dollars);
- farine de blé : 533 000 t (évaluées à 219 millions de dollars);

Les produits d'épicerie

Les principales sphères d'activité concernant les marchés de produits d'épicerie sont démembrées les mêmes que celles de l'exercice précédent.

Diverses campagnes de promotion ont été organisées en Europe, aux États-Unis et au Japon. Le ministère a innové, en participant à la Foodex de Tokyo, puisque 5 associations canadiennes y ont assisté au nom de leurs membres : l'Association canadienne des manufacturiers de produits alimentaires, l'Association canadienne des distillateurs, le Conseil national de l'industrie laitière du Canada, le Conseil des viandes du Canada (en collaboration avec le Conseil canadien du porc et la Canadian Cattlemen Association) et le Conseil des pêches du Canada (qui englobe l'Association canadienne des exportateurs de poisson et la British Columbia Seafood Exporters Association).

La Foodex a attiré 100 000 visiteurs commerciaux du Japon et du Sud-Est asiatique. Outre cette percée commerciale, une mission, regroupant des chefs d'association, s'est rendue au Japon et à Hong-kong pour étudier sur place les possibilités de commercialisation des produits. Cette mission était dirigée par le directeur général de la Direction de l'alimentation et elle comprenait des hauts fonctionnaires d'Agriculture Canada et du ministère des Pêches et des Océans.

Le Canada a aussi participé, à l'échelle mondiale, à deux expositions de produits alimentaires, soit à Cologne (Allemagne de l'Ouest), et l'exposition du Food Marketing Institute, à Dallas (Texas). Ces expositions prestigieuses ont permis à plus de 60 entreprises canadiennes de transformer des aliments d'exposer leurs produits, d'établir des contacts dans le milieu international et de réaliser des ventes.

Des foires solos de denrées alimentaires et de boissons ont eu lieu aux États-Unis; elles visaient surtout les villes du marché frontalier, c'est-à-dire Buffalo, Cleveland, Albany, Portland et Minneapolis. Ces foires ont permis aux entreprises de transformation de chacune des provinces de tirer profit du potentiel qu'offrent les centres américains qui se trouvent à leur frontière, lesquels peuvent être bien desservis par plusieurs entreprises canadiennes de taille modeste.

Comme au cours des exercices précédents, un spécialiste industriel a participé à toutes les réunions concernant les accords internationaux sur les produits de base (cacao, sucre et café).

Les importations ont, par la suite, été

: été établies par une mission de représentants du tabac, parrainée par le ministère, s'était rendue dans ce pays il y a plusieurs années. La demande de tabac a continué d'augmenter en Egypte, tant au niveau de la consommation nationale qu'à celui des exportations. On s'attend que l'Egypte deviendra un important marché permanent pour le tabac en 1971.

Les produits d'origine animale

La promotion des exportations de bovins, de porcs, semence et d'embarçons s'est poursuivie au même rythme qu'à celui des années précédentes. Des expositions ont été organisées au Salon international de l'agriculture, à Paris, à l'exposition Royal Highland, à Edimbourg (Ecosse), l'exposition Royal Easter, à Sydney (Australie), au Salon agricole des bœufs de Curitiba (Paraguay). En outre, une mission commerciale de la République dominicaine, formée de représentants du secteur de l'élevage du porc, est venue au Canada. Enfin, de nombreux acheteurs, en provenance de divers pays, sont entrés en contact avec des producteurs et des exportateurs canadiens de porc, ce qui a permis de réaliser d'importantes ventes de bovins et de semence.

Le Japon et les États-Unis demeurent nos principaux marchés pour le porc, et le ministère a continué d'encourager les exportateurs à développer ces marchés. De nombreuses demandes de renseignements, de nature commerciale, sur les produits de la viande, sur la volaille et sur les produits avicoles, les oeufs et les volailles d'élevage ont été reçues et transmises aux représentants de l'industrie.

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nouveaux marchés pour les pommes de terre de semence canadiennes.

Le personnel de la direction a aussi collaboré étroitement tant avec les représentants de l'industrie qu'avec les délégués commerciaux en poste au Brésil pour que les producteurs canadiens de pommes de terre à chair jaune puissent pénétrer le marché brésilien. Ces initiatives ont amené les autorités brésiliennes à établir des contingents d'importation et une première livraison commerciale de pommes de terre canadiennes à cha-
 jaune a été effectuée en janvier 1982.

La direction a participé activement aux négociations avec la Communauté économique européenne (CEE), ce qui a permis d'ouvrir à nouveau le marché italien aux pommes de terre de semence canadiennes. Elle poursuit, en outre,

actuellement ses pourparlers en vue d'assurer au producteur canadien, lorsqu'on aura établi une certification et des normes phytosanitaires réciproquement acceptables, l'accès en permanence au marché de la CEE. Les résultats de ces discussions auront une incidence importante sur les exportations de pommes de terre de semence canadiennes sur divers marchés du bassin méditerranéen.

Le Canada peut dorénavant exporter des cerises fraîches canadiennes sur le marché japonais. Jusqu'à maintenant, les japonais interdisaient l'importation canadiennes de ce produit pour éviter que le ver de la fausse-téigne n'entre dans leur pays. Toutefois, l'établissement de méthodes de fumigation acceptables pour le Japon, la visite d'un spécialiste des services phytosanitaires japonais au Canada et d'autres discussions bilatérales ont amené la levée de l'interdiction.

Par suite d'une visite au Canada parainée par l'industrie, une revue connue du Royaume-Uni, spécialisée dans le domaine des fruits, a publié une série d'articles sur les possibilités qu'offre le Canada en matière de production et d'exportation de pommes de qualité.

Grâce à l'aide de la Division des produits végétaux et de l'ambassade canadienne à Pékin, l'Alberta Wheat Pool a réussi à vendre, pour la première fois, des grains d'orge de maltage à la Chine. La demande de bière augmente énormément parmi la jeune population chinoise et si cette première livraison de grains donnait le rendement escompté dans les conditions de croissance propres à la Chine, des ventes substantielles pourraient être réalisées.

Le Canada a négocié au cours de l'exercice une première vente substantielle de tabac séché à l'air chaud en Egypte. Les bases de cette vente

des marchés d'exportation, ne représente qu'une des initiatives de cette nature qui ont été entreprises jusqu'à présent. On a également, pour ce secteur, rempli un grand nombre de types d'activités traditionnelles comme la recherche de débouchés et la participation à des expositions de bétail à l'étranger. Depuis l'instauration du PDME du secteur de l'alimentation, on a autorisé l'affectation d'une somme totale de 700 000 \$ au titre des projets.

La direction a eu recours au programme d'expansion des entreprises pour continuer de satisfaire aux besoins du secteur en matière d'expansion industrielle. Les activités ont surtout porté sur la mise au point des produits et procédés, sur l'accroissement de la productivité et sur la reconstruction des entreprises. L'aide à l'innovation touchait divers sphères d'activité, telles la biomasse et la transplantation d'embryons de bestiaux. La conjoncture économique actuelle amène plusieurs sociétés à étudier les possibilités qu'il leur sont offertes par le PCE au chapitre de l'accroissement de la productivité et de la reconstruction de l'exploitation des entreprises. Ainsi, en raison de la situation critique des pêches sur la côte Est, plusieurs garanties de prêts ont été approuvées pour faciliter la reconstruction des activités de transformation du poisson. La direction a, en outre, activement cherché à aider les sociétés de ce secteur qui désiraient mettre sur pied ou agrandir des établissements de transformation dans les régions désignées en vertu du programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre (PAAIM). Elle a ainsi, entre autres, permis à certaines entreprises des industries de la pêche, du conditionnement de la viande et des boissons d'accroître leur capital et de réaliser des études de faisabilité.

Les produits végétaux

En plus d'étudier les demandes d'aide en provenance du secteur et de gérer les activités entreprises aux termes des programmes susmentionnés, la direction a participé à l'évaluation de programmes qui intéressent l'industrie mais qui ne relèvent pas du ministère, dont le Fonds pour l'implantation de nouvelles cultures et le programme de propositions spontanées.

Dans le cadre du programme des foires et missions commerciales, des délégations techniques du Brésil, du Maroc et de la Yougoslavie, spécialisées dans les pommes de terre de semence, ont été invitées à venir étudier sur place les possibilités qu'offre le Canada à titre de fournisseur fiable de semence de qualité. Ces trois pays pourraient éventuellement constituer de

celles qui relèvent du Bureau des retombées industrielles et régionales. Au cours de l'exercice, des efforts considérables ont été déployés en vue de définir les projets de grande envergure qu'il a été prévu de décider d'exécuter dans le secteur de l'énergie électrique avant la fin du siècle.

LA DIRECTION DE L'ALIMENTATION (AGRICULTURE, PÊCHES ET PRODUITS ALIMENTAIRES)

L'industrie de l'alimentation, qui est l'une des industries les plus grandes et les plus diversifiées du Canada, constitue un secteur industriel important dans chacune des provinces. La Direction de l'alimentation a, par conséquent, participé à une vaste gamme d'activités d'expansion industrielle et commerciale. Puisque la croissance des exportations revêt, depuis quelques années, de plus en plus d'importance, et que la demande internationale a diminué à cause de certains facteurs démographiques, la direction a continué de mettre l'accent sur la promotion des exportations. Elle a ainsi participé à la venue de 81 acheteurs et de 6 missions commerciales, de même que l'envoi de 5 missions à l'étranger, et subventionné 18 campagnes de promotion commerciale. En outre, 17 entreprises de transformation des aliments ont reçu, dans le cadre du programme d'expansion des entreprises (PEE), une aide financière se chiffrant à 7,2 millions de dollars.

La direction a amélioré et modifié ses programmes visant l'expansion du commerce international et mis sur pied, à l'automne de 1981, le programme de développement des marchés d'exportation (PDME) pour le secteur de l'alimentation. Fondé sur les travaux de l'ancienne section R du PDME, ce programme offre des formes d'aide diverses et souples pour l'expansion des activités d'exportation dans le secteur. Le PDME du secteur de l'alimentation englobe toutes les activités habituelles des diverses sections du PDME, ainsi qu'une série spéciale d'activités qui visent à répondre, de façon tout à fait particulière, aux besoins relevant de l'expansion des exportations du secteur de l'agriculture, des pêches et des produits alimentaires. Au nombre de ces activités particulières, qui sont très diversifiées, figurent des livraisons d'essais, l'envoi de représentants outre-mer et des essais relatifs à l'alimentation des animaux; l'aide accordée aux premières livraisons de poissons canadiens en Afrique et à l'acquisition de certains biens d'équipement spéciaux nécessaires à l'expansion

Le pays en acquérant la Reliance Electric Pany, de Cleveland (Ohio).

La division a continué de collaborer étroitement avec l'industrie en vue de maximiser le contenu des services publics qui sont vendus au public. On a également achevé la préparation de plans et de stratégies pour les industries de grandes entreprises de moteurs industriels et de machines électriques à vitesses réglable.

Quant à l'exercice, la division s'est efforcée de promouvoir, au sein de l'industrie de l'électricité, l'objectif d'autonomie énergétique nationale. Plusieurs projets ont été réalisés par l'intermédiaire du programme de recherche et de développement de l'énergie industrielle. On a, en outre, apporté l'aide industrielle et commerciale aux technologies de remplacement de l'énergie, y compris les centrales hydrauliques de basse chute, les microcentrales hydro-électriques, les cogénérateurs, la production d'hydrogène et ses applications, ainsi que les photovoltaïques solaires.

La division a aussi grandement contribué à l'expansion des marchés d'exportation. Les spécialistes en électricité du ministère ont participé à des missions de repérage de marchés en Australie et en Inde. Ainsi, une mission australienne canadienne de l'énergie électrique pour le repérage de nouveaux débouchés pour le secteur canadien de l'énergie électrique et, un plus tard au cours de l'exercice, c'étaient les représentants des services publics australiens qui venaient visiter des entreprises canadiennes. Les échanges ont permis d'accroître les ventes de produits électriques à l'Australie. La division a aussi participé à d'autres missions commerciales dont quelques acheteurs de groupes d'acheteurs de l'Islande. La revue des États-Unis et de l'Islande. Le Canada a été remarqué et considéré comme un partenaire valable, de sorte que les acheteurs étrangers peuvent dorénavant y trouver les noms d'entreprises et de produits canadiens.

Les pays en développement, surtout en Asie et en Afrique du Sud, entreprennent actuellement des projets de développement de grande envergure dans le domaine de l'énergie électrique. Grâce à la collaboration des délégués commerciaux envoyés dans ces pays, il a été possible d'y répéter les visiteurs débouchés dont le nombre ne fait que croître.

La division a aussi continué d'offrir des services experts-conseils, surtout en ce qui a trait aux nouvelles initiatives du ministère, dont notamment

Dans le cadre des efforts déployés par le gouvernement en vue d'accroître les exportations canadiennes au Japon, qui constitue un marché complexe, deux missions commerciales se sont rendues dans ce pays pour étudier les perspectives qui s'offrent dans le domaine des télécommunications. En ce qui a trait au marché spatial, les activités de commercialisation mises en oeuvre au cours de l'exercice ont surtout été axées sur l'Australie, le Mexique, le Brésil et le Proche-Orient. Divers documents relatifs à la politique spatiale ont été préparés en collaboration avec le ministère des Communications et avec le ministère d'État chargé des Sciences et de la Technologie. On a, en outre, pour ce qui est de l'élaboration et des systèmes de télétexte, entrepris certaines activités en matière de politique et d'aide industrielle.

Le sous-secteur industriel canadien des fibres optiques a, pour sa part, bénéficié d'une aide accrue au cours de l'exercice, et on a favorisé la participation de certaines sociétés de téléphonie - par exemple, celle du gouvernement albertain - à des projets d'exportation. En outre, on a soutenu plusieurs projets de commercialisation particuliers touchant les télécommunications sur tous les continents.

Enfin, l'industrie du télédon a su tirer parti de l'aide qui lui offrait tant des comités industriels et intergouvernementaux que des programmes particuliers par exemple, le programme de stimulation de l'investissement industriel et le programme d'expansion des entreprises - et de sa participation à la forte commerciale de Londres. Les succès qu'ont connus les exportations canadiennes en Allemagne (Siemens) et aux États-Unis (Times Mirror), de même que l'adoption par l'AT&T, à titre de norme pour son propre vidéotex, du mode de présentation télédon en 1981, a permis de mieux faire face à la forte concurrence internationale qu'exercent le Royaume-Uni (Presitel) et la France (Antipode).

L'avionique et l'électronique de défense

Les résultats obtenus au cours de l'exercice dans le secteur de l'avionique et de l'électronique de défense ont été impressionnants. Les exportations aux États-Unis ont atteint 345 millions de dollars et celles destinées aux pays d'outre-mer, 87 millions de dollars. Pour le dernier trimestre seulement, les exportations se sont chiffrées à plus de 200 millions de dollars, indiquant ainsi une tendance à la hausse.

En 1981-1982, dans le cadre du programme de production de l'industrie du matériel de défense (PPIMD), 33 millions de dollars ont été affectés à ce secteur, ce qui a notamment permis

L'énergie électrique

La Division de l'énergie électrique a continué de collaborer étroitement avec l'industrie de l'électricité afin de la rendre plus concurrentielle tant au pays qu'à l'étranger. Durant l'exercice, la division a eu recours au programme d'expansion des entreprises dans le cadre de plusieurs nouveaux projets en vue de mettre au point des produits à technique canadienne tout à fait particuliers du point de vue de la production, de transmission et de distribution de l'électricité. En outre, le PPIMD a permis de soutenir la mise au point d'un moteur sous-tractionnaire destiné aux marchés militaires.

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multinationales pour trouver des fournisseurs canadiens.

Dans le cadre de ses activités régulières, la division met constamment à jour un profil de l'industrie canadienne de l'informatique et du matériel de bureau, et elle participe à des projets visant à promouvoir sa croissance. La poursuite de tels efforts revêt une importance capitale, car le déficit commercial pour les ordinateurs et le matériel de bureau augmente rapidement : il a atteint 1,8 milliard de dollars en 1981-1982. Le programme de mise en oeuvre des systèmes de communication pour les bureaux, entreprises conjointement par le ministère et par le ministère des Communications, a, lui aussi, pour objet l'étude des applications des nouvelles technologies.

Les produits de consommation (gros appareils et appareils portatifs)

La division a élaboré, en collaboration avec l'industrie, un nouveau programme de remise de droits et de tarifs douaniers, portant sur la période commençant le 1^{er} janvier 1982, pour le secteur de la télévison. Le programme d'aide à la réorganisation de certaines industries (PARCI) englobe dorénavant l'industrie des gros appareils; 15 millions de dollars y ont été affectés pour les deux prochaines années afin de favoriser la réalisation des plans d'investissement des entreprises de ce secteur. De telles mesures ont été prises pour moderniser, automatiser et renforcer les installations de production déjà en place, et pour améliorer ainsi sensiblement la productivité. La division a concentré davantage ses ressources dans les programmes de commercialisation et de promotion des exportations, notamment en effectuant des études de marché et en participant à la foire commerciale internationale "Domo Technica", tenue à Cologne (Allemagne de l'Ouest). Au cours de l'exercice, la division a entrepris un examen exhaustif des programmes qui pourraient être utilisés pour soutenir l'industrie des appareils portatifs. La consultation auprès de l'industrie à ce sujet se poursuit.

Les télécommunications

Au cours de l'exercice, on a continué à offrir, dans le cadre du PPIMD et du PCE, une aide considérable à l'industrie des télécommunications. Les télécommunications demeurent un secteur dynamique de la technologie de pointe qui a recours aux programmes de recherche et de développement, ainsi qu'au programme de développement des marchés d'exportation (PDME).

phériques dans le domaine des applications de la micro-électronique à la conception de produits ou procédés de fabrication.

centres serviront, en outre, à transmettre à l'industrie, dans chaque région, des renseignements sur la micro-électronique et ses applications. On s'attend que les centres d'effort des cours et des programmes de formation, fourniront des installations à l'industrie de la région et qu'ils assureront le transfert de la technologie micro-électronique aux entreprises qui demandent leur aide.

Traitement de l'information et l'informatique

Les sommes engagées au titre des nouveaux plans de développement approuvés dans le cadre du programme des entreprises (PCE) et du programme d'expansion de l'industrie du matériel de production (PPIMD) ont atteint, pour ce qui est de la participation du secteur public, 32,5 millions de dollars. Ces crédits comprennent une contribution de 17 millions de dollars versée à la Control Data Corporation pour mettre au point un super ordinateur et une autre contribution accordée à la Mitel Corporation pour mettre au point le produit privé automatique SX-2000. Certains produits issus de ces projets sont essentiels à la croissance de l'industrie de la bureautique.

personnel de la division a pris part aux travaux de 32 comités d'examen des achats et a participé à l'élaboration de lignes directrices et le recours aux marchés publics pour fournir les services et les produits nécessaires à l'information. L'information a été mise sur pied dans des projets d'envergure ont été mis sur pied Canada, notamment un centre de recherche et de développement de 17,5 millions de dollars et un autre de conception de logiciel de 25 millions de dollars.

division a monté les standards canadiens pour deux autres expositions commerciales d'information, la National Computer Conference (Conférence nationale de l'informatique), à Chicago, et la Conférence internationale de l'informatique, de la communication et de l'organisation de bureau (ICOB), à Paris, et elle a aussi accueilli une session belge d'importateurs et de distributeurs. collaboration avec un grand éditeur canadien, personnel de la division a dressé un nouveau portefeuille des exportateurs canadiens, **Canada in the World of Computing**, qui a été diffusé dans tous les bureaux des légations commerciales. La division a aidé plusieurs petites et moyennes entreprises à rechercher des débouchés pour leurs produits et elle a collaboré avec plusieurs firmes

activités en matière de commercialisation et de planification de mesures législatives. Les sections suivantes offrent un aperçu général des réalisations de la direction au cours de 1981-1982.

L'élaboration de la politique et de la stratégie

La direction a lancé, en janvier 1982, le programme d'aide à l'accroissement de la productivité des techniques (AAPI). Ce programme a pour but d'accroître la capacité des fournisseurs canadiens des secteurs de l'électronique et de la machinerie et de favoriser l'application et l'utilisation des nouvelles techniques électroniques, en ce qui a trait aux produits et aux procédés de fabrication, dans les secteurs industriels. Le budget du programme s'élève à 67 millions de dollars (soit 52,1 millions de dollars, auquel s'ajoute le financement spécial de l'électronique) et il porte sur une période de trois ans.

Un rapport sur la transmission des données et sur l'utilisation de la téléinformatique dans les sociétés multinationales a été préparé à l'intention d'un groupe d'étude interministériel de transmission des données. Conçu en étroite collaboration avec les associations industrielles, cette recherche s'appuyait sur les renseignements tirés d'entrevues menées auprès de certaines des principales entreprises multinationales exploitées au Canada, ainsi que sur des questionnaires remplis par ces dernières.

La micro-électronique et les instruments

Dans le cadre du programme AAPI, des centres de technologie avancée en matière d'applications industrielles de la micro-électronique ont été créés en collaboration avec des universités situées un peu partout au Canada. Ces centres visent, en particulier, à répondre aux questions des entreprises canadiennes sur l'utilisation de la micro-électronique et à leur fournir des services techniques. De tels centres se trouvent à l'Université de la Colombie-Britannique, à l'Université de l'Alberta, à l'Université de Manitoba, à l'Université de Sherbrooke. On envisage actuellement d'en établir d'autres dans les provinces de l'Atlantique.

Le budget initial du ministère a cette fin se chiffre à un million de dollars et porte sur une période de cinq ans, après laquelle les centres devraient être financièrement autonomes. La principale tâche de ces centres est de fournir aux entreprises industrielles, des services

du Canada, les colloques "Toujours profiter du design". Ces colloques montraient aux propriétaires et aux exploitants de centres touristiques comment, grâce à l'esthétique industrielle, ils pouvaient accroître leur efficacité, attirer et satisfaire plus de visiteurs et, ainsi, devenir plus concurrentiels et accroître leurs bénéfices.

En avril 1981, la direction a tenu à Montréal le "Symposium sur le design D3", qui était organisé en collaboration avec l'Université du Québec à Montréal et le Centre de recherche industrielle du Québec (CIRQ). Ce colloque traitait des avantages de l'utilisation de l'esthétique industrielle et des méthodes dans ce domaine. Les conférenciers et les participants venaient d'Allemagne, d'Italie, du Royaume-Uni, des États-Unis et du Canada.

Au cours de l'exercice, la direction a fourni des services de consultation d'esthétique industrielle aux entreprises, aux organismes, aux autres ministères fédéraux et aux gouvernements provinciaux.

Dans le cadre d'un concours, Design Canada a décerné 12 bourses d'études, au Canada et à l'étranger, à des étudiants en esthétique industrielle pour l'année scolaire 1981-1982.

Le Conseil national de l'esthétique industrielle a tenu trois séances plénières dans des villes du Canada. Design Canada a participé à plusieurs événements internationaux, notamment au congrès semestriel du Conseil international des sociétés de design industriel (CISID), tenu à Helsinki (Finlande).

même direction.

LA DIRECTION DE L'ELECTRICITE ET DE L'ELECTRONIQUE

La Direction de l'électricité et de l'électronique a contribué grandement à mettre en valeur le potentiel du Canada, tant au niveau national qu'international, dans ce secteur d'activité qui évolue rapidement. Collaborant étroitement avec l'industrie, la direction encourage les entreprises à avoir recours à la technologie de pointe, diffuse des renseignements et participe à d'autres

cours de l'exercice, la direction a organisé des expositions de produits d'hygiène canadiens à Santa (Georgie) et au Centre canadien du commerce à Tokyo.

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associations commerciales pour les inviter à participer spontanément, avec leurs sociétés membres, à des programmes d'élaboration de politiques visant à encourager la substitution des importations par des produits fabriqués au Canada. Des initiatives d'envergure ont ainsi pu être prises avec l'appui des organismes du secteur public, de l'industrie des produits d'hygiène et de l'industrie pétrolière.

Le ministère et Approuvations et Services Canada se sont joints aux efforts pour mettre en place un programme qui incitera quelque 11 000 acheteurs du secteur public à donner la possibilité aux fabricants canadiens de leur présenter des soumissions.

Des pourparlers ont eu lieu avec des représentants de l'industrie pétrolière, qui ont, à la suite de ces entretiens, accepté d'examiner la possibilité d'acheter davantage de produits fabriqués au Canada. Cette industrie attache énormément d'importance à l'expansion des fournisseurs en raison des avantages économiques que présente le fait d'avoir des sources sûres d'approvisionnement au pays. Il est à prévoir que ce programme, sous la responsabilité de l'industrie pétrolière, prendra de l'envergure au cours du prochain exercice.

De même, sous les auspices de l'Association des fabricants canadiens de produits alimentaires, l'industrie alimentaire commence à préciser le genre de débouchés que son secteur peut offrir pour favoriser, à l'intention des manufacturiers canadiens, l'expansion du marché intérieur.

Les responsables du programme des débouchés miniers, instauré au cours de 1980-1981, ont présenté un contre-salon commercial qui a été couronné de succès. Depuis, l'industrie minière a établi, par l'entremise de comités permanents spéciaux, des liens plus étroits avec les fournisseurs. Ces nouvelles façons d'aborder les problèmes des fournisseurs et des acheteurs se reflètent encourageantes. Les résultats de cette première initiative en vue de créer un marché canadien plus vigoureux se sont, en effet, révélés utiles pour orienter les programmes en cours.

LA DIRECTION DES PRODUITS CHIMIQUES

En 1981-1982, l'industrie des produits chimiques a haussé de façon marquée son niveau de production et d'exportation, même si les conditions étaient plutôt défavorables dans la plupart des autres secteurs de l'économie. Toutefois, à la fin de l'exercice, les effets de la récession économique

Les produits chimiques industriels

Des consultations ont été menées auprès des provinces et du secteur privé en vue de formuler une politique d'expansion de l'industrie pétrochimique. Un groupe d'étude interministérielle a été mis sur pied pour examiner la disponibilité éventuelle et les coûts futurs des matières premières pétrochimiques.

La Direction des produits chimiques a pris part aux réunions du Groupe international d'étude du caoutchouc, à l'intérieur duquel les producteurs canadiens des consommateurs de caoutchouc naturel et synthétique peuvent échanger des renseignements. Le Canada occupe le cinquième rang parmi les producteurs pour la production du caoutchouc synthétique et le septième rang pour la consommation de caoutchouc tant synthétique que naturel.

Grâce à sa participation au conseil d'administration des activités du Supplément Institutionnel Canada (SUDIC), un organisme à but non lucratif qui encourage la recherche sur de nouvelles utilisations du soufre. Une étude portant sur l'offre et la demande de lubrifiants au Canada pour la période de 1980-1981 a été achevée pendant l'exercice. D'après les résultats de cette étude, l'offre sera, chaque année, supérieure à la demande durant toute la période.

Les matières plastiques, le caoutchouc et les produits chimiques spéciaux

En 1981-1982, les exportations de produits en matière plastique ont continué d'augmenter pour afficher une hausse de 20 % par rapport à l'exercice précédent. Toutefois, les importations représentaient encore le tiers de la demande du marché intérieur. Deux missions, une à Detroit l'autre à San Francisco, ont été organisées en

région à l'autre du Canada, les provinces de l'Ontario ayant eu des niveaux d'emploi élevés, alors que les provinces de l'Atlantique et le Québec connaissaient des ralentissements. Les commandes de nouveaux navires conventionnels ont été peu nombreuses et la plupart des contrats passés au cours de l'exercice avaient trait à l'exploitation des hydrocarbures au large des côtes (dans l'Atlantique et la mer de Beaufort). Les réparations et conversions de navires ont continué de représenter près du tiers de l'activité des chantiers navals.

Le niveau des ventes des fabricants de pièces de navire s'est pratiquement maintenu par rapport à l'exercice précédent. La forte concurrence étrangère, particulièrement dans le secteur de l'exploration du pétrole et du gaz au large des côtes, a empêché les ventes de croître dans certains cas, et réduit ainsi la marge bénéficiaire prévue. Les fabricants d'engins de pêche aux États-Unis et généralement optimaux pour ce qui est des perspectives de vente dans ce pays. À cet égard, le programme d'aide aux constructeurs de navires (PACN) s'est poursuivi.

Le directeur a favorisé l'expansion du marché en assurant la présence du Canada, au moyen de stands, à l'Offshore Technology Conference (Conférence sur la technologie off-shore) de Houston (Texas), ainsi qu'aux expositions Offshore Europe d'Abberdeen (Écosse) et Oceanology International de Brighton (Angleterre), et grâce à des standards d'information à plusieurs autres foires internationales.

En ce qui concerne les retombées industrielles des achats du gouvernement, le directeur a aidé au bureau du programme créé en vue de l'acquisition de la frégate canadienne de patrouille en assurant la gestion des activités reliées aux retombées industrielles.

LE PROGRAMME DES DEBOUCHÉS COMMERCIAUX CANADIENS

Les responsables du programme des débouchés commerciaux canadiens (PDCC), créé en octobre 1981, ont pris des mesures concrètes pour faire en sorte que le Canada accroisse, grâce à l'achat de produits fabriqués au pays, la part du marché canadien qu'il détient.

Ce programme vient compléter les activités entreprises par le Bureau des retombées industrielles et régionales et par les directions de secteurs industriels du ministère. Les responsables du programme ont entamé des pourparlers avec les

ce qui est des programmes déjà en place, le lancement des ventes aux termes du programme d'expansion des entreprises (PEC) a été élargi et englobent les activités relatives au DASH-8, nouvelle phase d'exploitation de la technique lisant les ailes soufflées, la mise au point de moteurs P1-6 et P1-150 plus puissants, le perfectionnement du moteur P1-6 et le lancement de la veille série de moteurs PW-100. La surveillance des activités reliées aux projets déjà établis, s'ajoute à l'Aviation Challengier, des produits civils d'ingénierie et des réservoirs aériens de velles dispositions ont été prises pour urer, au niveau ministériel, la surveillance du programme DASH-8.

Les négociations se sont poursuivies dans le cadre l'Accord général sur les tarifs douaniers et le commerce (GATT) pour élargir la franchise de droits sur les avions et les pièces de moteur marchés d'outre-mer en vertu de l'Accord de commerce des avions civils.

CP-140 Aurora, de la Lockheed, le CF-18, de la Bombardier, et les achats, par Air Canada, les avions ont, notamment, fait l'objet, dans le cadre de marchés publics importants, de négociations pour veiller à ce que le secteur de l'aéronautique bénéficie de retombées industrielles. En outre, deux nouveaux projets ont en cours de négociation : le programme de mise de défense aérienne à faible altitude et le programme de modification de la structure des avions du C-130. Les méthodes de vérification et de contrôle ont été renforcées et étendues grâce à l'autorisation plus poussée des méthodes de planification et d'autorisation relatives aux retombées industrielles.

Le directeur s'est vivement intéressé à analyser l'expérience de la participation de l'industrie canadienne à la mise au point et à la construction d'un avion pouvant transporter 150 passagers par société Airbus Industries, Boeing et McDonnell Douglas.

Le cadre du programme de productivité de l'industrie du matériel de défense (PPIMD), on a atteint un nouveau record puisque, dans l'ensemble du secteur industriel, au titre de la recherche et développement, de l'établissement de sources de production ou de la modernisation d'installations, 150 projets ont reçu de l'aide.

Directorat de l'industrie maritime

1981-1982, le niveau d'activité des industries maritimes, ainsi que la construction et de la réparation des navires, a été très inférieur d'une

L'EXPANSION INDUSTRIELLE ET COMMERCIALE

sera chargée de coordonner ces activités d'expansion industrielle, parmi lesquelles figurent l'adaptation des collectivités, ainsi que la mise en place, après négociation, de mesures commerciales d'appui.

Plusieurs initiatives ont été prises dans le secteur de l'automobile, dont la désignation de l'industrie d'automobiles d'origine à titre de secteur industriel administré à l'aide d'ordonnances dans le cadre du programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre (PAAIM), l'application de restrictions aux exportations d'automobiles japonaises au Canada et la conclusion, avec la société Volkswagen, d'un accord d'entente en franchise pour appuyer les nouveaux investissements qu'elle envisage d'effectuer au Canada.

Dans le secteur de l'aérospatial, les travaux se sont poursuivis en ce qui a trait à la surveillance et à l'application de la disposition sur les retombées industrielles prévues aux termes du contrat signé avec la McDonnell Douglas et portant sur l'achat du nouveau chasseur canadien.

LA DIRECTION DES INDUSTRIES AEROSPATIALES ET MARITIME

Le Directeurat de l'Industrie aérospatiale

Le secteur de l'aérospatiale a pour principale vocation de concevoir et de fabriquer des avions, des hélicoptères, des missiles, des fusées, des engins spatiaux, etc. Ce secteur est très important pour l'économie française et européenne. Il emploie environ 100 000 personnes et génère des revenus considérables. Les principales entreprises du secteur sont Airbus, Dassault, Safran, etc.

L'industrie de meuble s'oriente vers les marchés internationaux d'exportation et elle renforce ainsi largement la balance commerciale canadienne des produits manufacturés.

Le Directeur de l'industrie aérospatiale a mis sur pied et parrainé un certain nombre d'activités nouvelles dont la mise au point de l'aéronautique légère (LALCA), une mission en triplicite à coussin d'air (LACA), une mission en Pologne, ainsi qu'une étude visant à déterminer les possibilités de coopération industrielle, y compris une analyse des perspectives qu'offre la construction d'hélicoptères au Canada.

Le groupe d'expansion industrielle et commerciale des secteurs industriels et commerciaux - auxquelles se dirigent les groupes commerciaux - chargés, d'un pat, de l'expansion industrielle et commerciale des entreprises et de la fabrication et de certaines transformations, et, d'autre part, de certaines industries de services dont la construction et les conseils techniques, la distribution et les transports. Le rôle principal du groupe est de fournir à un maximum d'entreprises techniques sur les secteurs industriels qui leur permettent d'établir des politiques de voir à l'efficacité des programmes et des services destinés à favoriser l'innovation industrielle, les investissements, la production et la commercialisation des exportations.

En 1981-1982, les directions de l'ICIC ont joué un rôle de tout premier plan dans une série d'opérations importantes d'intégration gouvernementales importantes. Ainsi, les travaux sur les retombées financières et les régionales de des dépenses projetées d'immobilisations ont débouché sur l'annonce, en août 1981, des objectifs et lignes directrices concernant les retombées financières, les dépenses provinciales et les dépenses fédérales. L'intention est de des dépenses provinciales et des dépenses fédérales, d'assurer un développement économique, social et régional pour faire en sorte que les fondations canadiennes aient des chances égales de profiter de soutien et la concurrence étrangère.

La priorité accordée aux progrès de l'électronique, de même que nos autres produits et procédés de fabrication canadiens, a suscité, en janvier 1982, l'annonce d'un programme triennal d'aide à l'accroissement de la productivité au moyen de techniques (AAPI), de 93 millions de dollars (soit 52,1 millions de dollars, auquel s'ajoute le Fonds spécial de l'électronique), lequel vise à promouvoir la fabrication et l'utilisation de produits électroniques.

En vertu d'une nouvelle politique destinée aux
secteurs de textile et de l'habillement, on a
annoncé, en juin 1981, l'établissement d'un
programme quinquennal de 267 millions de dollars.
Le programme prévoit la création de 100 offices
canadiens pour un renouvellement industriel (OCRI) qui

quelque 107,8 milliards de dollars. La valeur des exportations canadiennes était de 53,7 milliards de dollars, soit environ les deux tiers de l'ensemble des ventes du Canada à travers le monde. Les importations canadiennes en provenance des États-Unis sont, pour leur part, évaluées à 54,1 milliards de dollars, ce qui représente 70 % du total des importations du Canada.

Le 1^{er} janvier 1982, la troisième des huit réductions échelonnées de droits de douane sur la plupart des positions tarifaires américaines, conformément aux négociations de Tokyo, est entrée en vigueur, améliorant ainsi l'accès aux marchés américains de nombreux produits canadiens. A

d'autres égards, cependant, la situation était moins encourageante. Même si le gros des produits et services canadiens a continué de circuler librement, la nouvelle législation, aux termes du

Buy American Act, qui accorde la priorité aux fournisseurs américains pour la passation de commandes par l'État, tant au niveau fédéral qu'à celui des États, a constitué une source d'inquiétudes graves pour les exportateurs canadiens, particulièrement dans le secteur de la sidérurgie et des produits sidérurgiques. En

outre, les protestations des États frontaliers contre les importations de pommes de terre et de bois d'œuvre résineux en provenance du Canada, les propositions en vue de restreindre davantage les importations d'uranium et l'adoption par le

Congrès d'un bon nombre de projets de loi de "réciprocité" étroits qui auraient pour effet d'assujettir l'accès aux marchés américains au traitement accordé aux produits américains par d'autres pays constituaient manifestement des pressions protectionnistes.

La Division des relations commerciales et la Division des affaires tarifaires du gouvernement américain ont continué de fournir aux exportateurs canadiens des renseignements, des conseils et une aide directe pour toutes les questions touchant leur marché. Ces questions touchaient notamment des aspects politiques, des mesures commerciales précises, des probabilités de classification tarifaire, et ainsi que l'étiquetage, les aliments et drogues et autres aspects relatifs aux règlements non tarifaires.

marchandises d'importation contrôlée. On exige permis individuels pour l'importation du sucre n'être en mesure de fournir des statistiques à l'OIS et de contrôler les importations fournisseurs des pays non membres.

boeuf et le veau. Le 14 mars 1981, le boeuf et le veau ont été retirés de la liste de marchandise d'exportation contrôlée. Par le passé, le Canada réglementait les exportations de boeuf et le veau par l'échange de correspondance avec les États-Unis. Avec l'élimination des restrictions américaines à l'importation, l'entente intergouvernementale est venue à échéance, et cet article a été retranché de la liste.

25 mars 1981, les produits des aciers spéciaux et produits des aciers spéciaux ont été retirés de la liste de marchandises d'exportation contrôlée. Cet article, qui avait été placé sur la liste en décembre 1976 par suite d'un contingentement américain des produits des aciers spéciaux a été éliminé à l'expiration de ce contingentement.

Le 3 mars 1981, à la suite de la libération des otages de l'ambassade iranienne à Téhéran, l'Iran a été retranché de la liste des pays visés par contrôle.

5 juillet 1981, on a modifié la liste des pays contrôlés en faisant disparaître toute référence à la République populaire chinoise. Cette mesure a été prise en reconnaissance de l'amélioration des relations entre le Canada et la Chine.

BUREAU DES RELATIONS AVEC LES ÉTATS-UNIS

commerce bilatéral avec les États-Unis a continué de prendre de l'ampleur en 1981 et durant le premier trimestre de 1982, même si les autres protectionnistes américaines à l'égard de certains produits ont entraîné quelques difficultés.

1981-1982, les échanges commerciaux bilatéraux entre le Canada et les États-Unis se sont élevés à

En décembre 1981, le gouvernement japonais a annoncé que des mesures avaient été prises en vue d'accroître les importations du Japon. On voulait ainsi répondre aux fortes pressions exercées par les États-Unis et par la Commission économique pour l'Europe (CEE), avec lesquels le Japon a des excédents commerciaux de marchandises considérables. Ces mesures comprenaient l'adoption anticipée des réductions tarifaires acceptées par le Japon lors des négociations de Tokyo, qui se sont terminées récemment, et les engagements pris par le gouvernement japonais en vue de travailler à la libéralisation de toute une gamme d'obstacles non tarifaires au commerce réduisant l'accès au marché japonais. Même si ces mesures ne s'adressaient pas directement aux Canadiens, les exportateurs canadiens devaient profiter quelque peu de la réduction générale du niveau de protection au Japon.

A la suite d'un examen exhaustif des relations commerciales et économiques avec l'Australie et la Nouvelle-Zélande, des négociations ont été amorcées avec des hauts fonctionnaires du gouvernement néo-zélandais, lesquelles ont amené la signature, en novembre 1981, d'un nouvel accord commercial et économique bilatéral entre le Canada et la Nouvelle-Zélande. Ce nouvel accord, qui est entré en vigueur le 1er janvier 1982, remplace celui qui existait depuis 1932. Il prévoit le maintien des arrangements relatifs aux droits de douane préférentiels et la tenue de consultations régulières sur les questions commerciales et économiques qui intéressent les deux gouvernements. L'accord prévoit, en outre, l'expansion des relations bilatérales pour inclure des domaines tels que la coopération industrielle, les entreprises en participation et la coopération avec les marchés du tiers monde.

En novembre 1981, des discussions se sont déroulées à Ottawa avec des hauts fonctionnaires du gouvernement australien afin de trouver un moyen d'améliorer les arrangements commerciaux bilatéraux et de faire en sorte qu'ils reflètent les changements survenus dans le milieu commercial international. Les nombreuses propositions qui ont été avancées feront l'objet d'études plus poussées, et les discussions se poursuivront au cours du prochain exercice.

La Division du Pacifique a passé en revue les rapports publiés par la Commission d'aide aux industries australiennes afin d'évaluer l'incidence des recommandations qui modifient les conditions d'accès des produits canadiens au marché australien. Des démarches ont été entreprises au moment opportun pour le compte des exportateurs canadiens.

LE BUREAU DES RELATIONS COMMERCIALES SPÉCIALES

Le textile. A la suite d'un rapport publié par la Commission du textile et du vêtement, on a annoncé, le 19 juin 1981, l'adoption d'un programme visant à favoriser la restructuration de l'industrie du textile. Dans le cadre de ce programme, l'Office canadien pour un renouveau industriel (OCRI) a été créé afin d'aider l'industrie à atteindre ces objectifs, et la période de protection douanière a été prolongée pour assurer une plus grande stabilité pendant la période de transition. Le Bureau des relations commerciales spéciales a entamé des négociations avec le principal fournisseur de textiles à bas prix dans l'intention de conclure des arrangements portant sur la période de 1981-1986.

L'Arrangement multilatéral, qui fournit le cadre des négociations bilatérales sur des arrangements restrictifs, est venu à expiration le 31 décembre 1981. En sa qualité de représentant du Canada, l'OCRI a participé activement aux discussions portant sur la prolongation de cet arrangement pour une période de quatre ans et demi. Les négociations relatives à cet arrangement ont été fructueuses, et celui-ci reflète désormais plus fidèlement les besoins actuels au Canada.

La chausserie. Le gouvernement annonçait, le 24 novembre 1981, sa décision de remplacer le contingent global touchant seulement la chausserie autre qu'en cuir, conformément au rapport de février 1981 du Tribunal antidumping. La décision reflétait les conclusions du Tribunal, selon lesquelles l'industrie canadienne pouvait concurrencer les importations des pays industrialisés, renouer les importations principalement de chaussures en cuir. Le contingentement des chaussures autres qu'en cuir est d'une durée de trois ans et il se terminera le 30 novembre 1984; il prévoit un taux annuel de croissance de 3 %.

Le café. Dans le cadre de ses engagements en tant que membre de l'Organisation internationale du café (OIC), le Canada a ajouté le café à la liste de marchandises d'importation contrôlée. On exige des permis individuels pour l'importation du sucre afin d'être en mesure de fournir des statistiques justes à l'OIS et de contrôler les importations des fournisseurs des pays non membres.

Le sucre. Par suite de ses engagements, le Canada en tant que membre de l'Organisation internationale du sucre (OIS) a ajouté le sucre à la liste

contexte des négociations commerciales multilatérales (NCM), la reprise des exportations de pommes de terre de semence en Italie et le report du moins perçu de ventes de fromage cheddar canadien en Europe en vertu de l'Accord NCM sur le fromage entre le Canada et la CEE.

Des consultations ont eu lieu avec la CEE en vertu de l'article XIX du GATT en ce qui concerne l'imposition de prix d'importation minimaux pour certains poissons importés par le Royaume-Uni.

Des représentations ont été faites auprès de la Commission économique pour l'Europe au Canada, principalement dans les secteurs de l'agriculture et des pêches, dont l'imposition par la CEE des contingents tarifaires à certains produits du poisson établis en vertu de l'Accord à long terme sur les pêches conclu entre le Canada et la CEE et les propositions de cette dernière concernant l'augmentation des droits de douane à l'importation des céréales de grains et la modification des règlements phytosanitaires concernant les exportations de bois d'œuvre canadien.

Le Canada a entamé des consultations avec la Commission économique pour l'Europe, en vertu de l'article XXIV(6) du GATT, au sujet de l'incidence de l'accession de la Grèce à la Communauté économique européenne sur les exportations canadiennes.

Les arrangements en vue de limiter la vente à des prix qui défient la concurrence des fromages exportés au Canada ont été conclus avec l'Autriche, la Suisse et les pays scandinaves. En outre, des consultations ont eu lieu avec l'Espagne, en vertu de l'article XXII du GATT, au sujet du fonctionnement du régime espagnol d'importation des produits du poisson.

La quatrième réunion du Comité mixte de coopération du Canada et de l'Europe s'est déroulée, à Ottawa, en juillet 1981. De plus, des consultations semi-annuelles avec la Commission économique pour l'Europe ont eu lieu à Bruxelles en avril et en novembre 1981.

La Division du Pacifique

En juin 1981, le gouvernement japonais a consenti à limiter à 174 213 le nombre de voitures particulières exportées au Canada entre le 1^{er} avril 1981 et le 31 mars 1982. Cette mesure a été prise à cause de la dépression du marché canadien de l'automobile et parce que le Canada craignait que la décision, prise plus tôt au cours de l'année par le Japon, en vue de restreindre les exportations de voitures particulières aux États-Unis n'entraîne leur détournement vers le marché canadien.

ctions portant sur la politique sectorielle et nt des répercussions sur le commerce des onefs civils, le matériel de télécommunications, les produits pétrochimiques, les produits ygiène et la construction navale.

ce qui est de la politique commerciale sur marchandises, le Canada a pris part aux actions visant à faire entrer en vigueur le même accord international sur l'étain et le miter accord international sur le caoutchouc urel. Le Canada a également pris part à une ie de réunions préparatoires sur le thé et le s d'œuvre tropical, qui devraient donner lieu un accord sur les grandes lignes des arrangements internationaux touchant ces produits. Les ont prorogés d'un an. Le Canada, fort de sa itité de principal consommateur, a participé ivement à ces négociations. Il a signé accord instituant le Fonds commun, en vrier 1981, et il a continué de collaborer au cessus d'élaboration de son règlement inistratif.

concessions agricoles auxquelles les NCM ont une lieu ont été maintenues. Des négociations commerciales agricoles et bilatérales portant sur i nombre de produits intéressant le commerce adien d'exportation et d'importation, surtout fromage, se sont déroulées.

BUREAU DES RELATIONS AVEC LES PAYS MEMBRES DE L'OCDE

1981-1982, les consultations et les réunions re des hauts fonctionnaires du gouvernement adien et les partenaires commerciaux des pays mbres de l'OCDE ont marqué certains progrès qui, ns une large mesure, étaient favorables aux porteurs canadiens. Il s'agissait, entre autres, de la résolution de problèmes commerciaux nchant les marchés des pays de l'Europe et du ifique.

bureau a continué de fournir aux gens affaires des renseignements sur les règlements gissant les droits de douane et les importations ur les pays relevant de leur compétence.

Division de l'Europe

certaines progrès ont été accomplis dans la solution de nombreuses questions commerciales latérales entre le Canada et la Commission nomique pour l'Europe (CEE), dont l'accès au ché de la CEE du boeuf de qualité supérieure, sujet au contingent tarifaire fixe de 000 tonnes proposé par cette dernière dans le

LES RELATIONS COMMERCIALES INTERNATIONALES

LE BUREAU DES RELATIONS COMMERCIALES GÉNÉRALES

Le Bureau des relations commerciales générales du ministère a participé activement, en 1981-1982, aux consultations commerciales multinationales, qui avaient notamment pour but de réduire les pressions protectionnistes de plus en plus vives que subissaient les systèmes commerciaux internationaux par suite de la récession prolongée des économies nationales et internationales.

Reconnaissant les dangers de cette tendance, le conseil ministériel de l'Organisation de coopération et de développement économiques (OCDE) a confirmé à nouveau sans équivoque, en juin 1981, l'engagement pris par les pays membres à l'égard des principes du système commercial libre et multilatéral. En outre, les parties contractantes à l'Accord général sur les tarifs douaniers et le commerce (GATT) ont convenu, en novembre, de tenir leur réunion annuelle de 1982 au niveau ministériel; le but de cette réunion est de se pencher sur les problèmes commerciaux actuels et d'établir un programme de travail pour les années 80.

Au nombre des activités reliées au GATT qui ont été mises en oeuvre au cours de l'exercice, il convient de signaler l'application progressive des résultats tarifaires et non tarifaires des négociations commerciales multilatérales (NCM), qui s'est poursuivie selon les prévisions. D'autres activités du GATT d'intérêt particulier se sont déroulées dans le domaine du règlement des différends. Le groupe spécial mis sur pied en vue d'examiner les dispositions des États-Unis sur le thon en provenance du Canada a conclu que cette mesure n'était pas conforme aux obligations américaines découlant du GATT. Au cours de l'exercice, le Canada a demandé qu'un groupe spécial se penche sur l'utilisation de la législation américaine en ce qui concerne les préférences visioles de la propriété industrielle; toutefois, le groupe n'a pas accepté les arguments invoqués par le Canada. Les États-Unis, après consultation avec le Canada, ont demandé qu'un groupe spécial soit formé pour examiner certains aspects, reliés au commerce, des activités de l'Agence d'examen de l'investissement étranger (AIE). Au cours de l'exercice, les activités du GATT ont surtout porté sur l'application des résultats des NCM et sur l'admission de tarifs acceptés lors des négociations de tarifs.

En janvier 1982, le Canada a participé à des discussions non officielles avec ses principaux partenaires commerciaux, soit les États-Unis, la Communauté économique européenne et le Japon. Ces discussions ont permis au Canada, qui était représenté par le ministre d'État au Commerce international, d'échanger sur les principaux défis auxquels fait face le système commercial international et de mieux comprendre le milieu du commerce international, en fonction du point de vue de chaque participant.

Le Canada a participé à d'autres discussions portant sur la politique commerciale internationale, notamment au niveau général que sectoriel. Ces discussions se sont déroulées sous les auspices de la Conférence des Nations unies pour le commerce et le développement (CNUCED), et les questions abordées étaient à l'ordre du jour d'autres rencontres, dont le Sommet économique d'Ottawa, le Sommet Nord-Sud à Cancun, la réunion des chefs de gouvernement du Commonwealth à Melbourne et les discussions commerciales multilatérales entre les principaux pays industrialisés au niveau des ministères et des hauts fonctionnaires. Au nombre des sujets traités figuraient le financement des exportations, les relations commerciales Est-Ouest et les aspects commerciaux des politiques relatives à l'investissement et à la concurrence. Dans le contexte des relations Nord-Sud, on s'est penché sur bon nombre de questions dont le transfert technologique, le système généralisé de préférences et une plus grande intégration des pays en voie de développement. Les pléniers avancés au système commercial international.

Les principales questions portant sur la politique commerciale industrielle auxquelles il a fallu accorder une certaine attention au cours de l'année comprennent l'examen parlementaire de la politique globale de l'importation, effectué par le sous-comité de la politique de l'importation, Comité permanent des affaires financières, commerciales et économiques de la Chambre des communes, les travaux de politique concernant l'exploitation au large des côtes, les aspects commerciaux de la politique relative à l'investissement et les dispositions des diverses politiques économiques nationales touchant les retombées industrielles. La participation au sein du Comité d'OCDE s'est surtout effectuée au sujet des activités de l'industrie et du Comité de l'acier. On a également accordé une grande priorité aux

en outre des campagnes de promotion à la radio, s'adressant directement aux consommateurs et portant sur la vente de poisson canadien dans la région de Chicago.

La liaison avec les représentants de la Chambre et du Sénat et avec les sociétés. Le programme de liaison avec les sociétés, qui a été couronné de succès, comprend dorénavant des activités de liaison avec les représentants de la Chambre et du Sénat. Ce programme a permis de recueillir les opinions des sociétés américaines qui ont participé à un sondage portant sur des questions d'actualité en matière de relations commerciales canado-américaines et de déterminer, dans une certaine mesure, la façon dont les États-Unis perçoivent le Canada comme marché d'investissement. En ce qui concerne la liaison avec les représentants influents de la Chambre et du Sénat, le programme représente un autre moyen non officiel de traiter des questions bilatérales qui se posent entre les deux pays.

Les visites de ministres. En collaboration avec les délégués commerciaux en poste aux États-Unis, le bureau a organisé et recommandé au ministre d'État au Commerce international d'effectuer une tournée officielle pour promouvoir, dans certaines villes et régions américaines, les biens et services offerts par le Canada et les intérêts canadiens. Le ministre s'est ainsi rendu à Dallas, à Houston, à Chicago, à Seattle, à San Francisco et à Los Angeles afin de rencontrer des gens d'affaires importants et des hauts fonctionnaires, de participer à des conférences et de présider l'ouverture officielle de stands canadiens dans diverses expositions commerciales.

Le développement industriel. Dans le cadre de son programme de développement industriel, le bureau a organisé, à Chicago, deux colloques sur les investissements au Canada. Lors du colloque tenu à Chicago en mars 1982, des hauts fonctionnaires du gouvernement canadien ont adressé la parole à un auditoire composé de gens d'affaires américains et leur ont exposé les objectifs de l'Agence d'examen de l'investissement étranger (AIEI) et des programmes d'adaptation de la main-d'œuvre internationaux dans le contexte des investissements américains ont fait part de leur expérience en ce qui a trait à des investissements particuliers qu'ils avaient effectués dans les provinces de l'Ontario et du Québec.

Il y introduire des nouveaux produits, de façon à stimuler l'expansion des exportations.

titre de centre des activités de commercialisation du ministère aux États-Unis, le Bureau de développement du commerce des États-Unis est chargé d'appliquer le programme de développement commercial et industriel (DCI) dans les territoires des États-Unis en matière d'exportations. La promotion du commerce, l'établissement de ports sur les activités de liaison avec les représentants de la Chambre et du Sénat et avec les sociétés, les visites des ministres et le développement industriel.

promotion du commerce. Les activités de promotion lancées et mises en oeuvre par le bureau se répartissent en deux catégories : les activités d'investissement et à court terme.

activités d'investissement et à long terme doivent être l'objet d'une planification approfondie; les constituent des étapes de la mise en location d'une stratégie globale de commercialisation dans un secteur industriel donné. En 1982, 46 foires et missions commerciales, ont été organisées par le bureau. Le ministre a participé à l'Offshore Technology Conference, une conférence sur la technologie offshore, à Las Vegas, à l'exposition Sunov, à Las Vegas, à l'exposition Farm Progress, en Illinois, et à de nombreuses autres expositions de pièces et d'accessoires d'automobile aux États-Unis. Le ministre a également participé à la participation des visiteurs, venus de tous les coins des États-Unis, au Salon de la mode canadienne, à l'Assocation de l'Assocation des vêtements d'enfants, à Montréal.

activités ponctuelles et à court terme sont, par leur part, lancées dès que de nouveaux touchés sont repérés sur le marché et elles doivent être mises en oeuvre, avec l'aide du Bureau privé, en peu de temps et à peu de frais. cours de l'année, 51 activités de ce genre ont été entreprises dont des expositions industrielles ont présentées dans les consulats canadiens et d'un bout à l'autre des États-Unis; notons

Les bureaux régionaux comptent quelque 120 agents qui participent à des activités touchant le développement industriel, le commerce et le tourisme.

Les bureaux régionaux ont donné suite à 3 472 demandes présentes dans le cadre du programme de développement des marchés d'exportation (PDME) et à 1 002 demandes soumises aux termes du programme d'expansion des entreprises (PEE), en 1981-1982. De plus, ils ont répondu à 1 878 demandes de renseignements sur l'investissement étranger au Canada.

LE SERVICE DES DÉLÉGUÉS COMMERCIAUX

Le Service des délégués commerciaux a administré, dans 68 pays, un réseau de 92 bureaux dont l'effectif était composé de 230 délégués commerciaux et de 170 agents de commerce recrutés sur place. Bien que le service soit passé du ministère de l'Industrie et du Commerce au ministère des Affaires extérieures, en janvier 1982, il est toujours chargé de servir les intérêts des hommes d'affaires canadiens à l'étranger.

Les bureaux à l'étranger ont exercé une grande influence sur les relations et les politiques commerciales, ainsi que sur l'expansion des exportations. Ils ont trouvé des débouchés pour les exportations et ont aidé les entreprises canadiennes à tirer parti des renseignements recueillis à cet égard. En 1981-1982, ces bureaux ont joué un rôle important en ce qui a trait aux contacts d'exportation de produits canadiens (évalués à 4,157 milliards de dollars). Ils ont, en outre, établi des contacts avec près de 3 000 acheteurs éventuels, aidé plus de 30 000 visiteurs canadiens, représentés le secteur privé que public, répondu à 109 000 demandes de renseignements en matière d'exportation et participé à 549 foires commerciales.

LE BUREAU DE DÉVELOPPEMENT DU COMMERCE DES ÉTATS-UNIS

En 1981-1982, les échanges commerciaux entre le Canada et les États-Unis ont atteint un chiffre record, soit 107,8 milliards de dollars. Les exportations canadiennes aux États-Unis se sont chiffrées à 53,7 milliards de dollars, tandis que les importations en provenance de ce pays se sont élevées à 54,1 milliards. Étant donné l'ampleur du marché américain et son importance pour les exportations canadiennes, le Canada doit offrir des programmes commerciaux conçus spécialement pour maintenir la part du marché qu'il détient et

L'un des faits saillants de l'année a été la reconformation par le président Reagan et le premier ministre Trudeau de leur engagement en vertu des accords de partage de développement et de la production du matériel de défense (APDPM) canado-américains, lors de leur rencontre à Ottawa. De nombreuses réunions avec les hauts fonctionnaires du gouvernement et des services militaires américains, ainsi que des colloques, des missions, des foires commerciales et d'autres événements ont favorisé un accroissement des débouchés de l'industrie canadienne du matériel de défense sur le marché américain.

Le bureau a parrainé la 20^e Conférence des industries d'exportation de technologie de pointe, qui a eu lieu à Ottawa, à laquelle ont assisté 61 délégués commerciaux du monde entier. Plus de 4 000 entreprises avec des gens d'affaires canadiens ont été menées.

Le Canada a réalisé une vente importante à l'Égypte, celle de dix avions Buffalo avec la possibilité d'en vendre éventuellement six autres à ce pays.

Les ministères fournissent aux entreprises canadiennes la gamme complète de ses services, grâce à ses bureaux qui sont établis dans toutes les régions du Canada. La décentralisation des activités liées à sa responsabilité en matière d'exécution des programmes, particulièrement l'égard des petites et moyennes entreprises, a grandement contribué à faciliter l'accès des gens d'affaires à toute la série de programmes de développement industriel et commercial offerts par le ministère au cours de l'année à l'étude.

LES BUREAUX RÉGIONAUX AU CANADA

Le rôle des bureaux régionaux a récemment été élargi dans le domaine des relations fédérales-provinciales et dans celui de la promotion du tourisme, de manière à ce qu'ils puissent mieux répondre aux besoins courants des secteurs public et privé, tout en assurant une liaison étroite avec les délégations commerciales du Canada à l'étranger. Ce nouveau rôle s'est traduit par un accroissement considérable du volume des activités dans les bureaux régionaux.

Chaque bureau régional possède un centre d'information qui fournit des renseignements sur les programmes d'aide aux entreprises offerts par les gouvernements fédéral et provinciaux. En 1981-1982, ces centres ont accueilli 7 891 visiteurs et ils ont répondu à 168 941 demandes de renseignements.

de produits connexes, d'établir des contacts et d'entamer des négociations avec des organismes publics étrangers.

Le bureau est formé de quatre divisions :

- La Division américaine voit à la gestion des accords de partage du développement et de la production du matériel de défense canado-américains. Elle est chargée d'assurer l'expansion des exportations sur le marché américain du matériel de défense, en ce qui a trait aux contrats accordés à un entrepreneur principal et à des sous-traitants canadiens, d'évaluer les débouchés du marché américain pour le matériel de défense canadien et de susciter des projets de coopération avec les services militaires américains en matière de recherche et de développement dans le secteur de la défense.
- La Division d'outre mer voit à la gestion d'accords de recherche et de développement et de production (RDP) conclus avec sept pays de l'Otan et avec la Suède. Elle continue de chercher des occasions qui permettront à l'industrie canadienne de participer aux projets de l'Otan et elle collabore, avec l'industrie canadienne, à l'expansion des marchés d'exportation du matériel de défense dans des pays d'Europe membres de l'Otan, ainsi que dans d'autres pays amis.
- La Division de la commercialisation aide l'industrie canadienne à commercialiser le matériel de défense et les produits connexes et évalue la rentabilité, pour le Canada, des exportations de matériel de défense.
- La Division des études et des analyses de marché effectue des études de marché pour certains produits, procède à des évaluations et à des analyses liées au marché d'exportation du matériel de défense et recueille, compile et analyse des données sur le commerce bilatéral du matériel de défense.

Le commerce du matériel de défense a augmenté en 1981-1982; les exportations ont atteint 1,350 milliard de dollars, tandis que les importations se sont élevées à 1,139 milliard. La majorité de ces transactions commerciales ont été effectuées avec les États-Unis. Près de 60 % des exportations aux États-Unis ont pris la forme de contrats de sous-traitance destinés à des entrepreneurs américains de l'industrie du matériel de défense, ce qui a été tout particulièrement avantageux pour les petits fabricants canadiens de matériel de défense et de produits connexes faisant appel à la technologie de pointe.

Israël (124 millions de dollars). Les importations, surtout de pétrole, ont diminué et ont passées, de 3,003 milliards de dollars en 1980-1981, à 2,570 milliards en 1981-1982.

Le ministère a parachevé plusieurs missions commerciales et il a accordé de l'aide dans le cadre de missions organisées par les provinces, ce qui a permis aux nouveaux exportateurs de pénétrer les marchés de cette région et aux entreprises d'être en place d'augmenter leurs ventes.

Le ministre d'État au Commerce international, est rendu, en mai 1981, en Arabie saoudite afin de discuter avec des ministres et des hauts fonctionnaires, ainsi qu'avec les représentants de sociétés canadiennes qui exercent leurs activités dans ce pays.

Le ministre a représenté le Canada à l'ouverture de la Foire internationale de Bagdad, en Iraq, qui s'est déroulée du 1er au 15 octobre 1981. Les exposants canadiens ont obtenu des contrats de vente pour les produits de l'automobile, le matériel de télécommunications, le blé et le matériel de construction. Toutefois, la situation politique qui oppose ce pays à l'Iraq, affecte encore gravement les débouchés pour les exportations canadiennes en Iraq.

Le bureau a été créé en 1959 au sein du ministère de la Production du matériel de défense afin de répondre aux besoins du gouvernement canadien, qui s'efforçait de former un groupe de personnes très spécialisées dans les secteurs industriel et commercial afin de promouvoir les exportations canadiennes de matériel de défense dans les pays amis et amis.

Les objectifs du bureau comprennent plus

écidément :

La recherche de débouchés pour les exportations canadiennes de matériel de défense et de produits connexes, et leur exploitation; l'organisation et l'orientation de la participation de représentants canadiens à la négociation d'accords bilatéraux et multilatéraux de coopération en recherche, en développement et en production (RDP) dans le secteur du matériel de défense; l'aide à l'industrie canadienne en vue de lui permettre, en ce qui concerne la commercialisation des exportations de matériel de défense et

L'importance du marché coréen, a publié récemment un plan d'expansion des exportations canadiennes en Corée. Les secteurs à fort potentiel de croissance identifiés sont les réacteurs CANDU, le charbon, l'uranium, les télécommunications, les céréales, les grains oléagineuses, les aéronaves et la pâte à papier.

Le voyage du ministre d'État au Commerce international en Corée, en juin 1981, a suivi de près celui qu'avait effectué au Canada, en avril de la même année, l'ancien ministre du Commerce et de l'Industrie; à ces deux occasions, les ministres étaient accompagnés d'hommes d'affaires importants. À son tour, le premier ministre du Canada s'est rendu en Corée au mois de septembre 1981; c'était la première fois qu'un premier ministre canadien visitait ce pays. Le président coréen doit, quant à lui, venir au Canada en août 1982. En outre, le Conseil canado-coréen des hommes d'affaires a tenu sa première réunion annuelle à Séoul, en septembre 1981.

Des entreprises canadiennes ont obtenu des contrats supplémentaires pour l'agrandissement d'une importante centrale thermique en Thaïlande. Le Canada y a investi, jusqu'à présent, plus de 150 millions de dollars. D'autres travaux d'agrandissement sont prévus pour 1982-1983. Le ministre thaïlandais de l'Industrie a effectué un voyage au Canada en juillet 1981.

Les exportations canadiennes en Afrique ont atteint 1,5 milliard de dollars en 1981-1982, comparativement à 873 millions en 1979-1980. Les exportations en Afrique représentent actuellement environ 16 % des exportations canadiennes à destination de pays autres que les États-Unis et continuent d'augmenter à un rythme acceptable. Les marchés actuels et éventuels de l'Algérie (389 millions de dollars), du Nigeria (96 millions de dollars) et de l'Égypte (127 millions de dollars) demeurent les plus importants en Afrique, mais le Canada a augmenté considérablement sa part du marché au Maroc, en Tunisie, en Libye et au Cameroun, où les exportations sont passées de 211 millions à 368,4 millions de dollars. Les exportations en Afrique de produits finis et semi-finis dans des secteurs comme le transport (de surface et aérien), l'énergie, les communica-

L'Afrique

tions et l'irrigation ont également augmenté pendant la période à l'étude. Les importations ont, pour leur part, plus que doublé en 1981-1982, pour atteindre 1,2 milliard de dollars, puisque le Canada a importé davantage de pétrole de l'Algérie, de la Libye et du Nigeria.

Au cours de 1981-1982, le Canada a accompli un certain nombre d'activités liées à la promotion des exportations en Afrique. Le premier ministre du Canada a profité de ses visites au Kenya et en Algérie pour promouvoir les échanges commerciaux et le ministre d'État au Commerce international a dirigé une mission de gens d'affaires au Kenya, au Zimbabwe et au Swaziland. Le ministre de l'Énergie, des Mines et des Ressources s'est occupé lui aussi, lors de son voyage en Égypte, de promouvoir la coopération dans le secteur de l'énergie. Le secrétaire d'État aux Affaires extérieures a dirigé des délégations canadiennes qui ont assisté aux réunions des commissions bilatérales Canada-Algérie (à Alger), Canada-Maroc (à Rabat), Canada-Tunisie (à Tunis). Des réunions de commissions bilatérales ont également eu lieu en Côte-d'Ivoire, au Zaïre et au Sénégal. Des délégations de la plupart des pays d'Afrique sont venues au Canada, dans le cadre de missions ministérielles et de visites de hauts fonctionnaires, pour rencontrer des représentants des secteurs public et privé et traiter avec eux de questions d'ordre commercial.

En 1981-1982, 27 missions ont été organisées au Canada et en Afrique. Le ministre a participé à des foires internationales en Algérie, au Maroc, en Zimbabwe et en Côte-d'Ivoire. Le secrétaire parlementaire auprès du ministre d'État au Commerce international a été l'hôte officiel de la Journée du Canada à la foire internationale Conférence des Nations unies sur les sources d'énergie nouvelles et renouvelables. Grâce à la coopération entre les gouvernements fédéral et provinciaux et les associations industrielles et commerciales privées, les exportations canadiennes au Proche-Orient ont encore augmenté de façon considérable, en 1981-1982. Les exportations ont atteint 1,139 milliard de dollars, par rapport aux 848 millions enregistrés au cours de l'exercice précédent, tandis que les ventes de services se sont élevées à près de 500 millions de dollars. Les principaux marchés d'exportation du Canada dans cette région ont été l'Arabie saoudite (455 millions de dollars), l'Iraq (294 millions

Le Proche-Orient

ont fait l'objet d'une présélection en vue de participer aux appels d'offres concernant ce projet.

L'Extrême-Orient

La Chine demeure un marché important pour les produits canadiens dont les ventes, en 1981, se sont élevées à un milliard de dollars. Le bétail représente environ 70 % des exportations canadiennes dans la région. Depuis quelques années, peu de projets ont pris forme en Chine, du fait des politiques de réajustement économique, mais la situation semble vouloir évoluer.

En août 1981, le secrétaire d'Etat aux Affaires étrangères a effectué une visite en République populaire chinoise, au cours de laquelle il a annoncé que le Canada entreprendrait un programme d'aide bilatérale au développement en Chine.

En 1981-1982, la sensibilisation et la participation des exportateurs canadiens se sont accrues en ce qui concerne les marchés de l'Inde et du Pakistan; en effet, les exportations se sont élevées à 346 millions de dollars en Inde et à 89 millions au Pakistan. Un Conseil commercial et économique Canada-Pakistan, composé d'un groupe d'hommes d'affaires et subventionné par le secteur privé, a été créé, au cours de l'exercice financier, et il a tenu deux réunions.

Le ministre pakistanais du Pétrole et des Ressources naturelles est venu au Canada à la fin de l'exercice pour examiner sur place le matériel pétrolier et gazier et effectuer une tournée de l'industrie des services.

La Corée demeure le quatrième marché d'exportation du Canada dans cette région, le commerce bilatéral ayant dépassé un milliard de dollars en 1981-1982. En revanche, les exportations canadiennes en Corée n'ont rapporté que 446,2 millions de dollars au cours de la même année, ce qui constitue une diminution de 11,5 % par rapport à l'exercice précédent. Ce déclin est attribuable au fait que les répercussions de la récession économique ont tardé à se faire sentir en Corée et que les livraisons de matériel destiné au réacteur nucléaire CANDU, dont l'installation à Wolsung est presque terminée, ont pris fin en 1980. Les statistiques de 1982-1983 feront état d'un certain nombre de grands contrats qui ont été signés au cours du présent exercice.

La Corée a toujours réservé plus de 46 % des importations canadiennes aux produits finis et semi-finis, ce qui représente un pourcentage nettement supérieur à ceux enregistrés dans les autres pays asiatiques. Le Canada, qui a reconnu

le Centre de commerce du Canada à Tokyo exerce ses activités depuis trois ans. Il a organisé des expositions, aidé 406 entreprises canadiennes à accueillir 10 400 hommes d'affaires japonais. Les ventes provenant de ces expositions ont été évaluées à 100 millions de dollars.

Australie et la Nouvelle-Zélande

Australie est habituellement le sixième marché du Canada pour les exportations de produits finis. En 1981-1982, les produits manufacturés ont atteint plus de 307 millions de dollars.

Le Canada a été publié en vue d'aider les exportateurs canadiens à s'approprier une plus grande part du marché australien. Le Canada a soutenu actuellement environ 2,7 % des importations australiennes. Compte tenu des succès qu'offre le marché de l'Australie, le ministre d'Etat au Commerce international a annoncé, en novembre 1981, que le Canada ouvrirait un bureau à Perth.

En 1981-1982, le commerce bilatéral entre le Canada et la Nouvelle-Zélande a rapporté quelque 35 millions de dollars. Les produits manufacturés constituent environ la moitié de toutes les ventes canadiennes sur ce marché. La Nouvelle-Zélande continue, en outre, d'offrir des perspectives prometteuses. En effet, une société de l'Alberta a obtenu récemment un contrat de 200 millions de dollars pour la construction d'une usine de fabrication de méthanol de laboratoire. La Société pour l'expansion des exportations (SECE) a signé un accord de prêt de 5 millions de dollars avec la Petrolgas Chemicals, fabricant de la Nouvelle-Zélande, afin de promouvoir la vente de biens et services canadiens dans le cadre de ce projet.

Pacifique

Le Canada a mis sur pied un grand projet commercial en Papouasie, Nouvelle-Guinée, soit le projet de développement de l'OK Tedi, évalué à 7 milliards de dollars. Ce projet comprend toutes les installations nécessaires (extraction et traitement des minerais, énergie, eau et engagement urbain) pour l'extraction de l'or et les concentrés de cuivre dans une région isolée de l'ouest du pays. En février 1982, la SECE a annoncé la signature d'un accord de 88 millions de dollars US en vue de mousser les ventes canadiennes de matériel et de services à l'OK Tedi Mining Limited. Quelques 60 fournisseurs canadiens

au Commerce international en a présidé l'ouverture. Le ministre a, pour sa part, envoyé au Mexique, en mars 1982, une mission de dirigeants d'entreprises canadiennes oeuvrant dans le domaine de la technique de pointe, mission qui était dirigée par des hauts fonctionnaires du ministère.

L'Amérique du Sud

Les relations commerciales entre le Canada et le Brésil ont continué de s'intensifier, grâce à des échanges de visites effectuées par des chefs politiques et des gens d'affaires importants de l'état au Commerce international a accueilli le gouverneur de São Paulo, premier état industriel du Brésil; le gouverneur était accompagné de nombreux chefs d'entreprise brésiliens. En décembre, le ministre a dirigé une mission de gens d'affaires à Brasília et à São Paulo afin d'aider un certain nombre d'entreprises canadiennes à décrocher des contrats importants pour des projets d'immobilisations au Brésil, principalement dans les domaines des communications, de l'aérospatiale, des transports et de l'électricité. Cette mission constituait une étape importante dans le cadre des activités couramment mises en oeuvre par le ministère pour aider les entreprises canadiennes à obtenir des contrats de vente de matériel aérospatial pour la mise en place du nouveau réseau national de télécommunications par satellite du Brésil.

En décembre 1981, le Canada a obtenu un contrat de 215 millions de dollars pour l'exploitation de la mine de cuivre de Tintaya, au Pérou. Le groupe SNC de Montréal assurera la gestion des travaux de génie, de conception, d'approvisionnement et de construction dans le cadre de ce projet.

LE BUREAU DU PACIFIQUE, DE L'ASIE, DE L'AFRIQUE ET DU PROCHE-ORIENT

Le Canada juge qu'il importe de plus en plus que le Pacifique, l'Asie, l'Afrique et le Proche-Orient figurent au nombre des grands partenaires commerciaux du Canada. Aussi, plusieurs projets d'envergonne ont-ils été entrepris dans cette région du monde. En 1981-1982, la Direction générale des projets outre-mer a été affiliée au

Le Japon

La deuxième Pacific Rim Opportunities Conference déployée en vue de favoriser l'expansion du commerce dans ces pays qui offrent de nombreux débouchés.

Le ministre d'Etat au Commerce international a présidé la conférence sur les possibilités des pays de la ceinture du Pacifique), PROCI, au lieu du 22 au 24 février à l'Hotel Harbour Castle de Toronto, sous la direction du Comité canadien du Conseil économique du bassin du Pacifique (CEBP). Plus de 80 conférenciers et invités ont participé à la conférence, dont le ministre d'Etat au Commerce international, le secrétaire d'Etat aux Affaires extérieures, un conseiller financier du gouvernement de la Malaisie et le directeur de la *Far Eastern Economic Review*. Des délégués commerciaux supérieurs en poste dans le Pacifique, des représentants du milieu universitaire et des gens d'affaires importants qui oeuvrent dans le Pacifique ont fait partie des groupes de travail axés sur des questions touchant des pays distincts et d'autres groupes qui abordaient des questions d'intérêt plus général, telles que les entreprises en participation, le financement des exportations et les importations. En fait, il y a eu plus de 400 participants à la conférence, alors qu'on en attendait environ 250.

Le Canada et le Japon entretiennent de bonnes et saines relations économiques et commerciales. Cependant, un seul problème important reste à résoudre, soit la signature d'un accord satisfaisant sur les exportations japonaises de véhicules automobiles au Canada. La quatrième réunion du Comité économique mixte Canada-Japon et la cinquième Conférence canado-japonne d'hommes d'affaires, qui ont eu lieu au cours de l'année japonaise, ont contribué, dans une large mesure, à favoriser la confiance et l'amitié qui caractérisent les relations entre les deux pays.

Le ministre d'Etat au Commerce international a rendu au Japon en mars 1982 en vue de conclure un accord satisfaisant sur les exportations de véhicules automobiles et d'accroître les ventes de produits canadiens sur le marché japonais, compté tenu, tout particulièrement, des mesures de libéralisation du commerce qui ont été prises dernièrement.

BUREAU DE L'AMÉRIQUE LATINE ET DES ANTILLES

Amrique latine et les Antilles, le niveau des exportations canadiennes dans cette région est resté le même en 1981-1982. Les exportations canadiennes dont les principaux marchés sont le Mexique, le Brésil et la Venezuela ont atteint 8 milliards de dollars. Les produits manufacturés ont constitué environ 3 % des ventes dans cette région. Le Mexique, l'année précédente, était le troisième marché des exportations canadiennes dans la région, est devenu le premier. Les exportations dans ce pays ont triplé depuis 1976, et elles ont atteint 5 millions de dollars à la fin de 1981.

ministère a réalisé 54 projets de promotion des exportations. Il a ainsi participé à sept foires commerciales, fait venir 31 délégations d'acheteurs et de hauts fonctionnaires et envoyé des missions commerciales dans cette région. Le projet le plus remarquable a été la participation de 37 sociétés à la Foire internationale du Citrique, à Lima, au Pérou; il s'agissait, en fait, du plus grand groupe d'entreprises canadiennes qui aient jamais pris part à une foire commerciale en Amérique latine. La participation de 18 sociétés à l'exposition minière d'Acapulco, Mexique, a également donné des résultats satisfaisants. Des missions commerciales canadiennes sont rendues à Panama, au Mexique, à Cuba, à l'Inde, au Brésil, au Chili, en Colombie, en Equateur, au Pérou et au Venezuela; des délégations d'acheteurs et de hauts fonctionnaires sont venues d'un certain nombre de pays de l'Amérique du Sud, de l'Amérique centrale et des Antilles. Le ministre d'Etat au Commerce international a dirigé des délégations au Mexique, en Colombie, au Brésil, à l'Inde et au Venezuela.

collaboration avec la Société pour l'expansion des exportations (SEC), le ministère a fourni une aide commerciale et financière à des sociétés canadiennes, ce qui leur a permis d'obtenir des contrats importants pour des projets qui devaient rapporter plus de un milliard de dollars en exportations canadiennes au cours des prochaines années. Ces contrats portent sur un éventail de services et services dans des domaines comme les transports, l'aménagement urbain, l'électricité, l'exploitation minière et forestière, les pâtes et papiers, les communications et l'enseignement. Le cours de l'année à l'étude, de nombreuses nations commerciales ont été établies entre le Canada et les pays de l'Amérique latine et des Antilles. Grâce à ces initiatives, un accord de coopération économique a été signé avec l'Equateur, et un accord-cadre a été conclu avec

Le Mexique

Le Comité commercial Canada-Mexique a tenu sa première réunion en 1981. Ce comité a été créé afin d'éliminer, dans la mesure du possible, les entraves au commerce bilatéral et d'assurer la tenue de discussions sur des questions commerciales touchant les deux pays. La première réunion, qui s'est déroulée à Ottawa, a été présidée conjointement par le sous-ministre canadien de l'Industrie et du Commerce et par le sous-ministre mexicain du Commerce.

Le premier d'une série de plans d'expansion des exportations, soit des approches détaillées pour accéder à certains marchés, qui touchait le Mexique, a été publié en avril 1981. On a, en outre, au cours de l'exercice, commencé à préparer de tels plans pour la Venezuela et pour le Brésil.

Le Premier ministre, accompagné d'un groupe de 27 hommes d'affaires canadiens importants, s'est rendu au Mexique, en janvier 1982, dans le but, notamment, d'apporter un appui politique à une soumission de l'Énergie atomique du Canada limitée (EACL) portant sur la vente de quatre réacteurs nucléaires CANDU de 600 MW. La proposition officielle concernant le projet nucléaire a été présentée le 1er février 1982 et elle comprenait, outre les dispositions d'ordre commercial et technique, une offre d'ordre financier qui nécessitait des garanties solides de la part du gouvernement canadien. Nombre d'autres visiteurs au Mexique du ministre d'Etat au Commerce international sont venues appuyer, au nom du gouvernement canadien, la proposition de l'EACL.

Le Venezuela. En outre, des hauts fonctionnaires canadiens ont participé à la réunion du Comité économique mixte Canada-Bresil, tenue au Bresil.

Le ministre appuie toujours les activités de l'Association canadienne pour l'Amérique latine et les Antilles (ACALA) et de la Chambre de commerce Brésil-Canada. Au nombre de ces activités figuraient les travaux du Comité bilatéral d'hommes d'affaires avec l'Argentine, parvenu par l'ACALA, un colloque de l'ACALA sur le marché de l'Amérique latine et des Antilles, à Toronto, une table ronde de l'ACALA et de l'AICA, également à Toronto, sur les possibilités d'entreprises en participation dans les Antilles du Commonwealth et des missions de l'ACALA en Amérique centrale, à Washington, à la Barbade et à l'Inde.

LE BUREAU DE L'EUROPE

Depuis des décennies, la plupart des pays d'Europe sont des clients réguliers du Canada. Malgré les difficultés qu'ont connues certaines parties de l'Europe, le Canada a réussi, notamment grâce à une campagne efficace de promotion du commerce, à maintenir un bon niveau d'échanges commerciaux dans la plupart des régions. Il y a eu une certaine diminution des ventes à l'exportation en Europe de l'Ouest, mais les exportations canadiennes en Europe de l'Est ont augmenté malgré les troubles qui règnent dans ces pays.

L'Europe de l'Ouest

En 1981-1982, la Communauté économique européenne (CEE), première entité commerciale au monde et deuxième partenaire commercial d'envergure du Canada, a absorbé 8,7 milliards de dollars d'exportations canadiennes. Au cours de l'exercice, les exportations canadiennes en Europe de l'Ouest ont diminué de 9,5 % pour s'établir à 10 milliards de dollars, alors que les importations augmentaient de 11,5 % pour passer à 7,8 milliards. La Grande-Bretagne, qui achète 33,2 % des biens et services exportés en Europe, demeure le principal marché européen du Canada. Par rapport à 1980-1981, les exportations canadiennes dans d'autres pays de l'Europe de l'Ouest ont connu une baisse, passant de 1,6 milliard à 1,3 milliard de dollars, tandis que les importations se maintenaient à 1,5 milliard de dollars.

Les initiatives du ministère en vue de nouer et d'entretenir des relations commerciales avec cette région ont surtout porté sur trois vastes domaines : la coopération économique, l'accès aux marchés et la promotion des exportations. Les activités de coopération économique se sont poursuivies en vertu de l'accord-cadre signé avec la CEE. Des groupes d'étude, composés de gens d'affaires et de hauts fonctionnaires canadiens et de la CEE, ont examiné les possibilités de coopération dans des secteurs industriels particuliers comme les produits forestiers, les métaux et les minéraux, l'économie de l'énergie et le transport urbain. Les efforts de coopération industrielle se sont également poursuivis au cours de l'exercice, surtout avec la Suède. Le Canada et l'Allemagne de l'Ouest ont entrepris ensemble un examen exhaustif des possibilités de coopération dans ce domaine, et des mécanismes spéciaux ont été mis en

L'Europe de l'Est

place à cette fin. Durant la même période, le Canada a participé à 36 foires commerciales et 16 missions commerciales ont été organisées au Canada et à l'étranger. Environ 38 % du budget global des projets de promotion du ministère a été affecté à ces activités.

Les relations Est-Ouest ont commencé à se détériorer à la suite de l'invasion de l'Afghanistan par l'U.R.S.S., en 1979, et la situation s'est aggravée après l'imposition de la loi martiale en Pologne, en décembre 1981. Ces événements ont incité les pays occidentaux, y compris le Canada, à prendre des sanctions contre l'U.R.S.S. et la Pologne, et c'est dans ce contexte que se sont situées les relations commerciales avec l'Europe de l'Est en 1981-1982. Toutefois, par rapport à l'exercice précédent, les exportations canadiennes en Europe de l'Est ont augmenté de 10 % pour atteindre 2,4 milliards de dollars. Les importations, pour leur part, sont passées à 350 millions de dollars, ce qui représente une augmentation de 14 %, laissant au Canada un excédent commercial de 2 milliards de dollars.

Les principaux clients du Canada en Europe de l'Est ont été l'U.R.S.S., la Pologne, la Yougoslavie et la Tchécoslovaquie. Les produits agricoles, principalement les céréales, ont formé 87 % des exportations en Europe de l'Est en 1981-1982. En outre, quelque 350 entreprises canadiennes y ont trouvé des marchés pour un éventail d'autres produits dont les pâtes et papiers, les machines et le matériel, les aéronautiques et leurs pièces, ainsi que les articles en métal. Les travaux entrepris par des sociétés canadiennes dans le cadre de grands projets au cours des dernières années se sont poursuivis. Le 29 décembre 1981, l'Energie atomique du Canada limitée (EACL) ratifiait un contrat de vente de 2 réacteurs CANDU avec la Roumanie.

Des consultations commerciales bilatérales ont été entamées avec la Pologne et la Hongrie. De plus, le ministre d'État au Commerce international s'est rendu en mai 1981 en Tchécoslovaquie et en Roumanie, et il a signé un accord économique à long terme avec ce dernier pays. Le ministère a par ailleurs des stands d'information et autres dans des foires commerciales qui ont eu lieu en Pologne, en Tchécoslovaquie, en Yougoslavie et en Allemagne de l'Est. Le ministère a également par ailleurs quelque 15 missions commerciales au Canada et en Europe de l'Est, y compris une visite du ministre roumain de la Machinerie.

GRUPE DES POLITIQUES DE MARKETING INTERNATIONAL

Les fonctions que remplit le Groupe des politiques de marketing international (GPMI) relèveront, d'abord, par suite d'une vaste réorganisation, du ministère des Affaires extérieures.

Les fonctions comprennent :

la recherche de nouveaux débouchés sur les marchés internationaux pour les services produits au Canada;

l'aide accordée à l'industrie canadienne pour lui permettre d'exploiter ces possibilités;

la négociation d'accords commerciaux pour faciliter l'accès des manufacturiers canadiens aux marchés internationaux;

l'élaboration de stratégies commerciales afin de promouvoir la croissance et l'expansion du commerce international;

le maintien de services de représentants commerciaux à l'étranger afin, d'une part, de favoriser et de promouvoir la vente de biens et services canadiens et, d'autre part, d'aider le secteur public à se tenir à jour sur les marchés d'exportation.

Le groupe, qui relève du sous-ministre adjoint au service des délégués commerciaux et au marketing international, assure la centralisation des données du ministère en matière d'analyse, d'élaboration et d'évaluation des politiques et programmes liés à l'expansion et à la promotion des exportations destinées à des marchés étrangers dans des pays distincts. À cette fin, il a fait appel aux compétences des directions de secteurs industriels du ministère et il a consulté d'autres ministères fédéraux, les gouvernements provinciaux et le secteur privé. Quatre ans, pour le Mexique, l'Australie, la Corée du Sud et le Brésil, ont été achevés en 1981-1982. Les autres plans dont ceux du Japon, de la Belgique, de l'Allemagne de l'Ouest et de l'Arabie

saoudite sont en cours de préparation et seront publiés à l'automne de 1982.

Le groupe est chargé d'examiner les moyens dont dispose, en matière d'aide financière à l'exportation, le Canada, et de contribuer à leur amélioration afin d'empêcher que les exportateurs canadiens ne soient défavorisés sur le plan de la compétitivité. En matière de délibérations politiques et d'aspects opérationnels, le groupe veille à ce que les objectifs et les préoccupations du ministère soient pris en compte par la Société pour l'expansion des exportations (SEE), par l'Agence canadienne de développement international (ACDI) et par la Corporation commerciale canadienne (CCC), ainsi qu'en ce qui touche la participation à des projets financés par des institutions internationales.

Le groupe a coordonné les initiatives interministérielles fédérales et les initiatives fédérales-provinciales touchant le marketing international, et il a fourni des services de secrétariat lors des sept réunions que la Commission d'expansion du commerce d'exportation a tenues pendant l'exercice. Ces réunions ont été particulièrement fructueuses, puisqu'elles ont permis aux membres de la commission provenant du secteur privé, tant de l'industrie que du milieu ouvrier, d'échanger leurs points de vue sur un certain nombre de questions ayant trait aux exportations, avec les représentants du gouvernement.

Le programme des projets de promotion. En 1981-1982, dans le cadre du programme des projets de promotion, 8,7 millions de dollars ont été accordés pour des foires et missions commerciales organisées par le ministère.

Grâce à la promotion des ventes de biens et services canadiens sur les marchés internationaux effectuées en vertu du programme, 900 sociétés ont pris part à 118 foires commerciales dans 28 pays. De plus, 650 représentants de l'industrie ont participé à 57 missions dans 41 pays et 1 615 hommes d'affaires de 66 pays ont été invités au Canada. On s'attend que les ventes à l'exportation qui découleront de ces rencontres dépasseront 350 millions de dollars.

LE PROGRAMME D'AIDE A L'ADAPTATION DE L'INDUSTRIE ET DE LA MAIN-D'OEUVRE (PAAIM)

Dans le cadre d'un programme d'inversement mis en oeuvre par le gouvernement en janvier 1981, neuf collectivités réparties dans plusieurs régions du pays ont été désignées admissibles à de l'aide fédérale pour réduire le chômage. En 1981-1982, 40 entreprises ont reçu, dans le cadre du programme d'aide à l'adaptation de l'industrie et de la main-d'oeuvre (PAAIM), une aide financière qui s'est chiffrée à 22,6 millions de dollars et qui devait fournir de l'emploi à quelque 3 000 personnes.

Le programme de 350 millions de dollars vise à alléger la détresse des collectivités canadiennes en proie aux bouleversements majeurs et permanents que connaissent les industries et aux licenciements de travailleurs de la région qui y sont reliés.

Le programme d'adaptation industrielle axée sur les collectivités (PAIC) constitue un volet du PAAIM qui est administré par le ministre. Le PAIC a pour but principal d'inciter les entreprises à réaliser des projets d'immobilisations viables pour venir en aide à des collectivités canadiennes désignées qui sont touchées par de sérieux bouleversements industriels. Les décisions relatives à l'aide sont prises par un comité spécial, chargé du développement industriel et communautaire, relevant de la Commission d'expansion des entreprises.

Deux industries (celles des gros appareils électroménagers et des pièces d'automobile) ont été désignées dans le cadre du programme d'aide à la réorganisation de certaines industries (PARCI), qui a pour but d'inciter les entreprises, en particulier les petites et les moyennes, à entreprendre des projets viables dans des secteurs désignés.

groupe et de lui attribuer une fonction de planification de la stratégie et d'élaboration de programmes.

Dans le cadre de la fonction de planification de la stratégie, le Niagara Institute a tenu une conférence de recherche sur l'avenir de la petite entreprise au Canada pour le secrétariat. Cette conférence avait pour but d'obtenir directement auprès des exploitants de petites entreprises des renseignements sur l'avenir du secteur dans les années 80, sur les difficultés envisagées et sur les mesures qui pourraient être prises pour les surmonter. Le rapport de la conférence de recherche constituera une base solide pour la mise au point d'une nouvelle stratégie de la petite entreprise au Canada.

Pour ce qui est de l'élaboration des programmes, il convient de noter le programme pour l'excellence dans la gestion de la petite entreprise, qui vise à faire le lien entre la petite entreprise et le milieu de l'enseignement, c'est-à-dire entre la théorie et la pratique. Dans le cadre de ce programme, le gouvernement fédéral conclura des ententes avec les écoles d'administration des maisons d'enseignement collégial et des universités pour mettre au point de la documentation destinée aux cours pratiques, pour offrir des bourses de travail destinées aux étudiants en administration leur permettant de travailler jusqu'à trois mois dans une petite entreprise et pour effectuer des recherches sur les politiques liées à la petite entreprise.

Le Bureau de défense de la petite entreprise

Le Bureau de défense de la petite entreprise, qui fait partie du secrétariat, a continué de jouer un rôle central pour la petite entreprise en réglant de façon satisfaisante les " appels en dernier ressort " et en répondant à des demandes de renseignements dont quelque 3 500 appels téléphoniques, lettres et correspondance adressée au ministre. Environ 600 exemplaires de la publication **Dossiers à conserver - Exigences à l'intention de l'entreprise privée** et bon nombre d'exemplaires d'autres publications et brochures ont été distribués.

Outre les réunions avec les représentants de nombreuses associations professionnelles, on a maintenu des liens avec les universités et la petite entreprise à l'échelle internationale. On a tenu des réunions avec des professeurs invités, des représentants de gouvernements étrangers, des journalistes et la Fédération japonaise des associations des petites entreprises.

Les canadiennes qui sont propriétaires et administratrices d'entreprises. Ce document inspire d'une étude effectuée à partir de données d'université Queen's, et il renferme des plus récentes de Statistique Canada, ainsi que des renseignements tirés d'une enquête spéciale.

Le projet d'envergure a été lancé au cours de l'exercice et il doit être terminé au début de 1984-1985. Il s'agit d'un examen effectué par l'Institut de recherche C. D. Howe sur les liens qui existent entre certaines politiques nationales et le fonctionnement et l'expansion d'entreprises petites; les conclusions de l'Institut seront ensuite analysées pour établir quelle sera leur incidence sur les politiques. Des travaux supplémentaires plus tôt dans l'année sur les discussions que les changements au sein de l'économie auront sur le rendement des petites entreprises servent de base à cette étude. Une autre étude importante, effectuée par un groupe d'experts-conseils, permettra de déterminer dans quelle mesure les petites entreprises contribuent directement à la valeur des exportations nationales par le biais de la sous-traitance et l'approvisionnement des gros exportateurs en composants et services.

Les initiatives

Cours de l'année, le Secrétariat de la petite entreprise a travaillé à l'élaboration de nouvelles politiques nationales visant à améliorer la situation économique et les perspectives de la petite entreprise. Parmi les initiatives annoncées dans le budget de novembre 1981, notons l'augmentation du revenu annuel de 100 000 \$ (1 000 \$) et du revenu d'imposition de 100 000 \$ (1 000 \$) et la déduction d'imposition pour les entreprises et l'élargissement aux entreprises non constituées en société du champ d'application des allocations des petites entreprises, une mesure destinée aux petites compagnies en difficulté. Le secrétariat a également collaboré avec le Bureau du contrôleur général et le ministre des provisions entre le gouvernement et les fournisseurs par la formulation de propositions permettant le règlement rapide des comptes gouvernementaux.

En décembre 1981, le Directeur des opérations internationales du groupe des projets spéciaux) a été nommé pour l'année 1982-1983. Depuis, on a entrepris un certain nombre de nouvelles initiatives qui permettront de réorganiser le

L'Institut de recherche sur les politiques d'intégration économique (IRPE), a dressé une bibliographie des ouvrages publiés sur le sujet au Canada. Il s'agit de la première étape de l'IRPE dans le rapport entre le secrétariat et l'IRPE dans le domaine de la petite entreprise.

Le ministre d'État à la Petite entreprise et au Tourisme a été l'hôte du 8e Congrès international de la petite entreprise, qui a eu lieu en octobre 1981 et qui a attiré quelque 650 délégués venus de 66 pays. Cet événement, dont le thème était "Interaction", a été organisé par le secrétariat. D'une durée de quatre jours, ce congrès a comporté 64 présentations, portant notamment sur le rapport entre la petite entreprise et les associations, les organismes d'investissements spéculatifs, les employés, les institutions financières, les grandes entreprises, les éducateurs, le gouvernement et les conseils. Le conférencier d'honneur à ce congrès a été M. Alvin Toffler, auteur du livre **Le Troisième Vague**, qui a parlé de la révolution occasionnée par l'avènement des techniques modernes d'information et de communication.

À la fin de 1981, on a fondé un comité international de la petite entreprise dont les réunions ont lieu tous les deux mois. Ces réunions ont pour objectif principal d'échanger de l'information, de coordonner et d'intensifier les efforts dans le secteur des politiques relatives à la petite entreprise. Le comité compte des représentants de 16 ministères et organismes fédéraux.

Le ministre d'État à la Petite entreprise et au Tourisme et le ministre d'État au Commerce ont annoncé conjointement, en novembre 1981, que le Groupement Québécois d'Entreprises Inc. avait reçu une subvention pour accroître les activités d'exportation des 450 petites et moyennes entreprises membres de cette association. L'aide versée par le gouvernement fédéral servira à acquitter le traitement et les dépenses d'un conseiller chevronné en matière d'exportation, le frais d'exploitation ainsi que les dépenses liées à la sous-traitance, aux déplacements et à l'hébergement et au personnel de soutien.

Les études sur les entreprises

On a poursuivi les travaux internes sur les taux d'échec et de création d'entreprises. On a terminé des études sur les facteurs entourant l'insolvabilité des entreprises, y compris les facteurs menant à la faillite, et fait une comparaison des lois sur la faillite en vigueur au Canada et aux États-Unis. Au cours de l'année, le secrétariat a publié un document de travail sur les problèmes auxquels doivent faire face les

bénéficiaire d'un soutien public et l'Arrangement relatif à la stagnation dans le secteur de l'aéronautique. Les progrès ont été lents, car certains gouvernements étrangers ont adopté des programmes de subventions qu'ils sont peu disposés à abandonner, surtout en raison de la faiblesse accrue des marchés à l'exportation. Cependant, le coût du financement des subventions à l'exportation au niveau adopté par certains gouvernements devient de plus en plus lourd, et l'on prévoit que des changements seront apportés dans la matière des taux d'intérêt, un peu plus tard en 1982.

LA DIRECTION DE L'ÉVALUATION DES PROGRAMMES

La politique établie par le ministre, en 1978, en vue d'effectuer des évaluations approfondies de toutes ses activités entreprises dans le cadre de programmes, au moins une fois les trois à cinq ans, a été maintenue en 1981-1982. Des études d'évaluation ont été achevées dans deux domaines d'activité au sein du ministère : la Loi sur les prêts aux petites entreprises et le Service des délégués commerciaux.

En outre, la Direction de l'évaluation des programmes a élaboré des plans et des cadres d'évaluation pour un certain nombre d'éléments du ministère, dont les bureaux internationaux, le programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre (PAAIM) et les remises de droits de douane.

LE SECRÉTARIAT DE LA PETITE ENTREPRISE

En raison du climat économique qui a prévalu en 1981-1982, le ministère a insisté sur l'aide à la petite entreprise au Canada. À cette fin, le secrétariat de la petite entreprise a mis en oeuvre un programme diversifié : colloques, symposiums, mesures législatives et stimulantes directs.

Au cours de l'année à l'étude, les recherches sur la communauté de la petite entreprise et sur les problèmes qu'elle doit affronter ont beaucoup progressé. Le secrétariat a terminé une mise à jour du profil statistique de la petite entreprise, lequel comprenait, pour la première fois, des renseignements sur la capacité d'exportation des petites entreprises manufacturières, ainsi qu'une étude sur les travailleurs autonomes non constitués en société au Canada. Afin de faciliter davantage les recherches de tout genre effectuées sur les questions touchant la petite entreprise, le secrétariat, en collaboration avec

L'introduction de nouvelles machines de traitement de texte de base dans le ministère a constitué la première étape de l'accroissement de sa capacité à capter l'information au moyen de l'électronique. En outre, un système d'acheminement des messages a été mis en place et expérimenté, un système automatisé de gestion des documents a été mis au point, et des essais sont actuellement en cours dans le cadre d'un projet pilote.

Dans le but d'augmenter le confort et d'accroître l'efficacité des lieux de travail, on a conçu un nouveau plan d'aménagement modulaire des bureaux et l'on a construit une maquette grandeur nature qui sera utilisée dans le cadre de toute planification future.

Un a tenu des séances d'information concernant la Loi sur l'accès à l'information et la protection des renseignements personnels, et les travaux relatifs au registre du ministère ont été achevés.

La Direction des services administratifs a également entrepris le regroupement des ministères de l'Industrie et du Commerce et de l'Expansion économique régionale sous un même toit, dans l'immeuble C. D. Howe, au 255, rue Queen, à Ottawa, de même que l'intégration des responsabilités et du personnel des deux ministères.

LA DIRECTION DE LA POLITIQUE ET DE LA LIAISON FINANCIÈRES

La Direction de la politique et de la liaison financières coordonne la politique et la liaison avec des sociétés d'État, des organismes gouvernementaux et des institutions financières du secteur privé, surtout avec la Société pour l'expansion des exportations (SEC) et la Banque fédérale de développement (BFD), lesquelles rendent compte au Parlement par l'entremise du ministre de l'Industrie et du Commerce de leurs activités. Elle est chargée de l'élaboration et de la coordination des conseils sur l'incidence financière des politiques et programmes du ministère.

Au cours de l'année, on a continué de négocier l'abaissement des subventions gouvernementales aux fins du financement des exportations dans le cadre des accords parafinancés par l'Organisation de coopération et de développement économiques (OCDE), dont l'Arrangement relatif à des lignes directrices pour les crédits à l'exportation

système de surveillance des réclamations de compensation dans le domaine de l'aéropatiale a mis au point afin de disposer de données sur les réclamations découlant des marchés importants inclus dans le domaine de l'aéropatiale. Les programmes de compensation, ou de retombées industrielles, sont reconnus comme un instrument d'expansion industrielle pour les industries axées sur les exportations.

Le programme du tourisme, un système d'inventaire des voyages à forfait a été mis au point, lequel fournit une description de ces voyages à forfait dont une des destinations est le Canada. De plus, un nouveau système a été mis en application afin de venir en aide aux agents de marketing touristique en leur fournissant des renseignements sur les acheteurs de voyages de congrès et de motivation.

En d'accélérer le paiement des comptes des entreprises du ministère, le système de gestion financière a été modifié pour permettre aux bureaux régionaux d'émettre des chèques.

Les nouveaux systèmes informatiques sont actuellement mis au point afin d'améliorer la qualité des renseignements disponibles dans des bases de données comme le tourisme, les programmes de jumelage du ministère, la gestion financière et l'analyse des secteurs industriels. Ces nouveaux systèmes seront en place en 1982-1983.

1981-1982, le ministère a dépensé 5,7 millions de dollars, soit 4,2 millions de plus qu'en 1980-1981, pour acheter du secteur privé des biens et services dans le domaine du traitement des données. Ces dépenses s'inscrivent dans le cadre de la politique du gouvernement, qui veut que les services de traitement électronique des données soient achetés auprès du secteur privé, sauf s'il y a de l'intérêt national ou plus économique de se procurer autrement.

Direction des services administratifs

La Direction des services administratifs a repris un programme de modernisation de ses installations, au cours de 1981-1982, en vue de leur répondre à l'accroissement des besoins d'un ministère restructuré. L'accent a été mis sur le perfectionnement de sa capacité de traitement électronique de l'information, et elle a apporté des améliorations au niveau des techniques et de la gestion en vue d'atteindre, dans l'ensemble, le maximum d'efficacité.

LA DIRECTION DE LA GESTION ET DES SERVICES FINANCIERS

La Direction de la gestion et des services financiers est chargée de déterminer les besoins en ressources à long terme du ministère qui figurent dans l'aperçu de la stratégie, élément essentiel des estimations et plans d'action pluriannuels exigés par le département d'État au Développement économique (DECE) et le Conseil du Trésor.

En 1981-1982, la direction a continué à élargir son rôle auprès du personnel de la haute direction du ministère en l'aidant à planifier l'affectation des ressources et à analyser les rapports soumis périodiquement sur les activités et les budgets du ministère. La direction a participé à la mise au point et au maintien des systèmes du ministère destinés à appuyer ces activités, et elle a continué à gérer la mise en application du système de perfectionnement des pratiques et contrôles de gestion et l'amélioration du Service de planification de l'évaluation.

La direction assure les services d'administration et de gestion par ordonnateur du ministère. Dans le cadre d'un programme global de gestion des données internes et externes, le Système d'analyses des importations, le Système de repérage des débouchés (SRD) et la Division de l'accès à l'information ont rendu compte de leurs activités par l'entremise de la direction.

Le Directeur de l'analyse des importations

Le Directeur de l'analyse des importations a continué à effectuer l'analyse des importations en se fondant sur les documents douaniers détaillés fournis en vertu de dispositions spéciales de la Loi sur le ministère de l'Industrie et du Commerce. Ces analyses offrent notamment des précisions sur toute caractéristique importante aux fins de production et de commercialisation, comme le type, le procédé, la fonction, la taille et le prix des produits.

Les rapports permettent aux entreprises et au gouvernement de déterminer de façon précise les possibilités de développement et sont particulièrement utiles aux petites et moyennes entreprises qui ne possèdent pas de service de sondage des marchés. Les ministères utilisent ces données pour évaluer l'incidence des politiques tarifaires et des contingents, ainsi que pour négocier de nouveaux accords commerciaux et déterminer l'aide qui sera accordée dans le cadre d'initiatives, en matière d'expansion industrielle, prises par le ministère.

Le Système de repérage des débouchés

Le Système de repérage des débouchés (SRD) est un programme fédéral-provincial conjoint qui aide à identifier les sociétés canadiennes qui peuvent être considérées comme des fournisseurs. Les sociétés canadiennes, les gouvernements et les organisations étrangères ont recours à ce système pour trouver des fournisseurs au Canada. Par exemple, les sociétés multinationales qui participent à des accords de compensation sur les marchés du gouvernement canadien peuvent avoir recours au SRD pour acheter une vaste gamme de produits. Les utilisateurs peuvent également y recourir pour chercher de nouveaux débouchés et mettre au point des répertoires spécialisés. La participation au SRD est volontaire et gratuite.

Le programme d'analyse de 1981 a permis aux clients qui ont fait appel au service de créer 3 362 emplois. Si le gouvernement fédéral a déboursé 181 \$ par emploi, en revanche, les clients ont investi une somme totale de 37 millions de dollars.

Les services informatiques

Au cours de l'exercice 1981-1982, on s'est employé à élargir la base des données.

Les gouvernements provinciaux se chargent, en général, de la collecte des données pour le compte du SRD, tandis que le gouvernement fédéral voit l'entrée des renseignements et à la mise à jour des fichiers. Les renseignements figurant aux fichiers, qui sont conservés par les gouvernements provinciaux, ainsi que par le MIC à Ottawa, sont bueaux régionaux au Canada et ses délégations commerciales dans le monde entier, sont largement diffusés dans le secteur privé.

Des innovations apportées dans de nombreux domaines ont contribué à l'amélioration des services informatiques du ministère.

dollars, ce qui représente une augmentation de 1,4 million de dollars par rapport à l'exercice précédent.

Tableau 4

Prêts garantis dans le cadre du programme de prêts aux petites entreprises par province et territoire, 1981-1982

Province ou territoire	Nombre de prêts garantis	Prêts garantis (en millions de \$)
------------------------	--------------------------	------------------------------------

1981-1982, le ministère a reçu 4 176 demandes subventions, un montant d'environ 31 millions de dollars ont été déboursés. Au cours de l'exercice précédent, le ministère avait reçu 3 312 demandes, 15,8 millions de dollars et déboursé 15,8 millions de dollars.

Les rapports des sociétés indiquent que, grâce au programme, elles ont réalisé 300 millions de dollars de ventes à l'exportation au cours de l'exercice. Depuis son instauration en 1971, le programme a permis à des entreprises d'effectuer des ventes à l'exportation représentant une somme totale de 4,8 milliards de dollars.

Programme de recherche et de développement de l'énergie industrielle

Le programme de recherche et de développement de l'énergie industrielle (PRDEI) favorise la mise au point de procédés et de matériel nouveaux et d'innovations afin de réduire la consommation d'énergie industrielle.

Cela a été établi, 26 projets nécessitant un financement total de 9,075 millions de dollars ont été approuvés. De ce montant, 1,774 million de dollars représentent les dépenses réelles effectuées jusqu'à maintenant et le reste, les engagements des prochaines années. En 1981-1982, des dépenses effectuées aux termes de ce programme s'élevaient à 563 000 \$.

Programme de prêts aux petites entreprises

Le programme de prêts aux petites entreprises, établi en vertu de la Loi sur les prêts aux petites entreprises, prévoit des prêts à terme assortis aux petites entreprises canadiennes pour leur permettre d'améliorer toute une gamme de biens d'équipement. L'emprunteur paie, sur de la part garantie par le gouvernement fédéral, un intérêt fixé à 1 % de plus que les taux d'intérêt des banques. La durée maximale des prêts est de dix ans.

En 1981-1982, 16 643 prêts (voir tableau 4) ont été garantis pour un montant de 491,9 millions de dollars, comparativement à 18 143 prêts d'une valeur de 470,7 millions de dollars au cours de l'exercice précédent. Les réclamations relatives aux pertes sur prêts acquittées au cours de l'exercice se sont élevées à 6,5 millions de

L'amélioration de la productivité et les comparaisons intersectorielles

Le Service d'amélioration de la productivité, créé pour aider l'industrie canadienne à améliorer sa compétitivité, a entrepris, en 1981-1982, toute une série de comparaisons intersectorielles dans des secteurs industriels, dont la chocolaterie, les textiles d'ameublement, les tapis, les meubles, les aciéries, les plaques de charbonnement en bois, la construction et la réparation des navires, la fabrication de la tôle d'acier, les boulangeries et les entrepreneurs de construction mécanique. Plus de 200 entreprises ont participé à ce programme au cours de l'exercice, ce qui porte à 1 000 le nombre de sociétés de quelque 55 secteurs industriels qui ont tiré profit du programme depuis son instauration.

Dépenses effectuées
dans le cadre du programme de productivité
de l'industrie du matériel de défense (PPIMD)
par région, 1981-1982

Région	Nombre de projets	Dépenses (en milliers de \$)
Nouvelle-Écosse	2	73,7
Québec	69	93 588,3
Ontario	110	57 581,7
Manitoba	1	7,7
Colombie-Britannique	7	3 683,5
Total	189	154 934,9

Le programme de développement des marchés d'exportation des services canadiens en partageant avec les entreprises les risques financiers que la pénétration de nouveaux marchés étrangers suppose. Les huit sections du programme couvrent la préparation de soumissions relatives à des projets précis, la recherche de nouveaux débouchés, la participation aux foires commerciales, les visites d'acheteurs étrangers, la formation de syndicats commerciaux d'exportation, l'expansion soutenue des marchés d'exportation, les marchés d'exportation pour les produits de l'agriculture, des pêches et de l'alimentation, ainsi que les contributions à des organismes à but non lucratif.

(EN MILLIONS DE DOLLARS)

DÉPENSES DANS LE CADRE DU PROGRAMME
DE DÉVELOPPEMENT DES MARCHÉS
D'EXPORTATION
ANNÉE FINANCIÈRE 1981-1982
TOTAL 12 812 000 \$

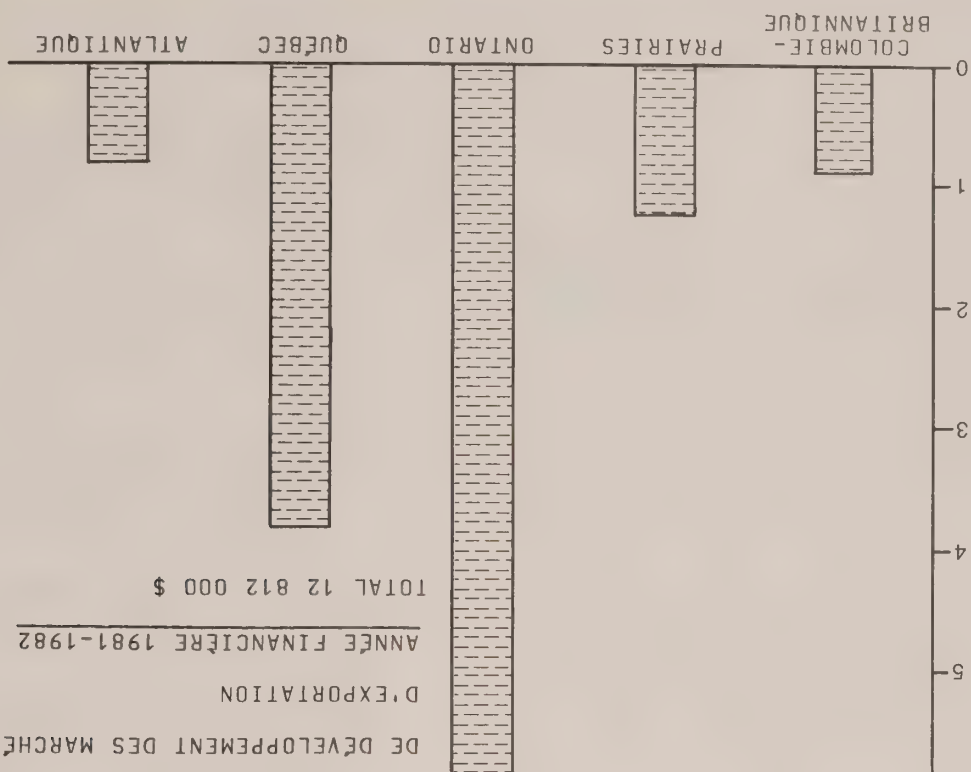


Figure 1

Tableau 2

Contributions autorisées,
au titre de l'innovation
et de la mise au point de produits,
dans le cadre du
programme d'expansion des entreprises (PCE)
par région, 1981-1982

Contributions de (en millions de \$)	Nombre de projets
Atlantique	26
Québec	306
Ontario	135
Prairies	75
Colombie-	34
Britannique	4,7
Total	576
	119,2

Le programme de productivité de l'industrie du
matériel de défense

Le programme de productivité de l'industrie du
matériel de défense (PPIMD) aide les entreprises
industrielles qui fabriquent du matériel de
défense ou des produits connexes. Il vise à
maintenir et à relever la compétence
technologique de l'industrie canadienne du
matériel de défense et des industries civiles
connexes. Le programme fonctionne en vertu
d'accords internationaux relatifs au partage de la
mise au point et de la production du matériel de
défense.

En 1981-1982, 85 projets (voir tableau 3), ayant
produit des ventes de 1,7 milliard de dollars ont
été achevés, et des contrats ont été signés pour
189 nouveaux projets. Les dépenses totales du
programme ont atteint 154,9 millions de dollars.
Par ailleurs, 67 % des ventes réalisées dans le
cadre de ce programme ont été faites sur le marché
des exportations du matériel de défense, tandis
que 33 % ont touché celui des exportations
civiles.

reprises, à l'amélioration de la productivité
aux comparaisons intersectorielles. Les sections
ventes offrent un bref résumé de ces activités
des fonctions qu'exercent les divisions qui en
sont responsables.

programme d'expansion des entreprises

Le programme d'expansion des entreprises (PCE)
des entreprises de fabrication et de
transformation à l'échelle internationale. Aux
membres de ce programme d'aide, on partage les
risques du projet ou l'on se porte garant, en
fournissant des ressources, d'un prêt à terme. En 1981-1982,
le programme a favorisé
l'adaptation des entreprises (voir tableau 1) ont
été autorisées pour une valeur de 131,7 millions
de dollars, ce qui devrait contribuer à créer ou à
maintenir quelque 6 600 emplois au cours des cinq
prochaines années.

En plus, des contributions (voir tableau 2), d'une
valeur de 119,2 millions de dollars, ont été
autorisées pour acquitter une part des coûts de
5 projets d'innovation et de mise au point de
produits dans des industries comme la machinerie,
l'électronique, les pièces de navire, les
véhicules à moteur, les composants du bâtiment et
le textile.

Garanties de prêts autorisées,
au titre de l'adaptation des entreprises,
dans le cadre du
programme d'expansion des entreprises (PCE)
par région, 1981-1982

Nombre de projets	Garanties de prêts (en millions de \$)
Atlantique	14
Québec	29
Ontario	66
Prairies	20
Colombie-	11
Britannique	1,6
Total	140
	131,7

LES FINANCES

LA DIRECTION DES PROGRAMMES

La Direction des programmes est chargée de la gestion et de l'administration générales des principaux programmes industriels financés par le ministère, dont les prêts, les assurances-prêts, les subventions et les contributions. Elle administre, en outre, la loi sur les prêts aux petites entreprises, en vertu de laquelle des prêts garantis sont consentis par des prêteurs du secteur privé désignés afin d'aider les petites entreprises commerciales. L'aide financière offerte par le ministère, sous forme de prêts, de subventions et de garanties de prêts, a continué de représenter un facteur essentiel de la stimulation et de l'expansion commerciale des industries canadiennes de la fabrication et des services en 1981-1982.

La direction a participé à un certain nombre d'activités et en a entreprises d'autres destinées à améliorer et à accélérer l'octroi de l'aide à l'industrie. Les discussions visant à consolider davantage les programmes actuels se sont poursuivies et des progrès notables ont été accomplis dans l'élaboration de méthodes permettant d'établir les priorités des projets d'envergure et d'en favoriser la réalisation. Enfin, la direction a travaillé énergiquement à l'élaboration d'une nouvelle voie hiérarchique de travail à un niveau plus efficace de gestion.

On a eu recours à des techniques de prévision améliorées et l'on a intensifié le contrôle de gestion des engagements pris aux termes de programmes pluriannuels. Les méthodes d'exécution des programmes ont été perfectionnées afin d'augmenter l'efficacité du traitement des dossiers et la rapidité des versements.

Dans le cadre de ses activités, la direction s'intéresse à l'expansion des entreprises, à la productivité de l'industrie du matériel de défense, à l'expansion des marchés d'exportation à la recherche et au développement de l'énergie industrielle, aux prêts aux petites et moyennes

Le groupe qui relève du sous-ministre adjoint aux finances voit à la gestion des finances du ministère, et il est chargé des services administratifs centraux. Il remplit également des fonctions uniques du fait des liens étroits qui existent entre le ministère et l'industrie au Canada, particulièrement dans les domaines de l'investissement et des garanties de prêt.

Les principales fonctions du groupe sont reliées à trois sphères d'activité :

- la planification globale du ministère -- conseils et lignes directrices en matière de planification et d'utilisation des ressources; planification des opérations et contrôle du budget; services liés aux finances, à l'administration et aux systèmes; évaluation de l'efficacité des programmes;

- la gestion financière -- activités bancaires et d'investissement, au nom du ministère, reliées aux services de gestion et d'administration centraux; conseils à la haute direction; participation aux conseils d'administration de banques de développement, d'organismes gouvernementaux et d'entreprises désignées; analyse des investissements destinés à du financement; orientation et administration des programmes de financement importants du ministère;

- l'aide à l'industrie -- conseils et analyses en matière de politiques touchant toute une gamme de questions qui intéressent le secteur industriel privé et qui ont une incidence sur le ministère, y compris ses responsabilités particulières à l'égard des petites et moyennes entreprises au Canada.

Ces fonctions comprennent les charges habituelles des agents des finances du ministère, comme celles d'établir les budgets et de tenir la comptabilité, ainsi que celle d'accorder, à l'instar de la haute direction, la priorité à l'amélioration des méthodes et procédés mis en oeuvre par le ministère et à sa responsabilité globale dont il doit rendre compte.

l'exercice précédent pour atteindre 2,4 milliards de dollars.

Les échanges bilatéraux entre le Canada et le Japon ont atteint 8,5 milliards de dollars, ce qui laisse le Canada avec un excédent commercial de 460 millions de dollars, comparativement à 1,6 milliard de dollars enregistré au cours de l'exercice précédent. Cette diminution est attribuable en grande partie à l'augmentation des importations de véhicules automobiles.

Des négociations se sont soldées par l'annonce du gouvernement japonais de limiter ses exportations de voitures particulières au Canada au cours de l'exercice.

En janvier 1982, le ministre d'État au Commerce international a représenté le Canada aux discussions officielles tenues sur le commerce avec ses principaux partenaires commerciaux, soit les États-Unis, la Communauté économique européenne et le Japon.

Les exportations du Canada en Amérique latine et aux Antilles, où le Mexique, le Brésil et le Venezuela constituent les principaux marchés, ont totalisé 3,8 milliards de dollars. Les produits entièrement manufacturés représentent environ 40 % des ventes à l'exportation dans cette région.

Les exportations des céréales et oléagineux d'importance, de même que celles de leurs

produits, ont atteint 5,9 milliards de dollars pour représenter 75 % des exportations agricoles du Canada.

- Le volume du commerce du matériel de défense s'est accru pour atteindre 1,350 milliard de dollars au chapitre des exportations, tandis que les importations se sont élevées à 1,139 milliard de dollars. La majorité de ces échanges se sont effectués avec les États-Unis.
- Le Service des délégués commerciaux a assuré la régie d'un réseau de 92 bureaux, répartis dans 68 pays, dont l'effectif était composé de 230 délégués commerciaux et de 170 agents de commerce recrutés sur place. Le service a été transféré au ministère des Affaires extérieures en janvier 1982.
- Dans le cadre du programme des projets de promotion, 8,3 millions de dollars ont été accordés pour des foires et missions commerciales organisées par le ministère. Grâce à ce programme, 900 sociétés ont pu prendre part à 118 foires commerciales dans 28 pays, 650 représentants de l'industrie ont participé à 57 missions dans 41 pays et 1 615 gens d'affaires, provenant de 66 pays, ont été invités au Canada.
- On s'attend que les ventes directes à l'exportation qui découleront des foires et missions commerciales au pays et à l'étranger dépasseront les 350 millions de dollars.

LES FAITS SAILLANTS

- La présente section offre un aperçu des activités du ministère au cours de l'exercice financier 1981-1982.
- On a entrepris l'intégration du ministère de l'Industrie et du Commerce (MIC) et du ministère de l'Expansion économique régionale (MEER) en les fusionnant en un seul ministère fédéral dont l'administration centrale est située dans l'immeuble C. D. Howe, à Ottawa.
 - Neuf collectivités ont été désignées au pays dans le cadre du programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre (PAAIM) et sont ainsi devenues admissibles à une aide fédérale pour réduire le chômage. Quarante entreprises privées ont reçu une aide totale de 22,6 millions de dollars, laquelle devrait procurer de l'emploi à quelque 3 000 Canadiens.
 - Les recherches sur les problèmes auxquels les petites et moyennes entreprises sont confrontées ont beaucoup progressé. Le Secrétariat de la petite entreprise a travaillé à l'élaboration de plusieurs politiques nationales visant à améliorer la situation économique et les perspectives des petites et moyennes entreprises.
 - Dans le cadre du programme d'expansion des entreprises (PEC), des garanties de prêts, destinées à favoriser l'adaptation des entreprises, ont été autorisées pour une valeur de 131,7 millions de dollars. En outre, des contributions s'élevant à 119,2 millions de dollars ont été versées pour acquitter les coûts de projets d'innovation et de mise au point de produits.
 - Dans le cadre d'une nouvelle politique gouvernementale, un programme d'adaptation de 267 millions de dollars visant à stimuler la croissance des industries du vêtement, du textile, de la chaussure et du tannage a été mis sur pied pour aider à neutraliser la concurrence des pays à faible coût de production. Ce programme prévoit la prolongation d'arrangements bilatéraux visant à restreindre les importations de certains produits.
 - Dans le cadre du programme de développement des marchés d'exportation (PDME), le ministre a reçu 4 176 demandes d'aide. Un montant
 - L'environ 31 millions de dollars a été approuvé et une somme de 12,8 millions de dollars a été déboursée. Le programme a permis de réaliser 300 millions de dollars de ventes à l'exportation.
 - Dans le cadre du programme d'aide à la réorganisation de certaines industries (PARC) un nouveau fonds de 25 millions de dollars a été créé en vue de favoriser l'adaptation du secteur des pièces d'automobile.
 - Le ministère a continué à fournir une aide financière pour l'établissement de centres de technologie de pointe et il a mis en œuvre d'autres mesures pour accroître la capacité technologique et la productivité des entreprises canadiennes.
 - Un certain nombre de problèmes, touchant les échanges bilatéraux, qui limitaient l'accès aux produits agricoles canadiens au marché de la Communauté économique européenne (CEE) ont été résolus.
 - Des consultations ont été menées auprès des provinces et de l'industrie privée en vue de formuler une politique d'expansion de l'industrie pétrochimique. Un groupe d'étude interministériel a été formé pour examiner les problèmes relatifs aux matières premières pétrochimiques.
 - Au chapitre du tourisme, les recettes du Canada sont évaluées à 16,5 milliards de dollars. Les Canadiens ont dépensé quelque 12,8 milliards de dollars. Les touristes américains ont dépensé 2,4 milliards de dollars, tandis que les touristes d'outre-mer y ont déboursé 1,3 milliard de dollars. Le déficit touristique du Canada a diminué de 5,7 % par rapport à l'exercice précédent.
 - Les échanges bilatéraux entre le Canada et les États-Unis ont atteint un sommet de 107,8 milliards de dollars. Les exportations canadiennes se sont chiffrées à 53,7 milliards de dollars, tandis que les importations se sont élevées à 54,1 milliards de dollars.
 - La Communauté économique européenne (CEE) a absorbé 8,7 milliards de dollars d'exportations canadiennes. Les exportations en Europe de l'Est ont augmenté de 10 % par rapport à

présent rapport d'activité du ministère de l'Industrie et du Commerce (MIC) porte sur les activités entreprises par le ministère au cours de l'année de transition.

Le 2 janvier 1982, le Premier ministre annonçait l'effet d'une importante réorganisation de l'Industrie et du Commerce. Cette réorganisation des ministères fédéraux, grâce à une action efficace, les priorités du gouvernement dans les années de l'expansion régionale et industrielle de la promotion du commerce et des exportations. Elle constituait, en outre, une étape importante de la mise en application des stratégies adoptées dans le document **Le Développement économique du Canada dans les années 80**, publié par le gouvernement fédéral en même temps que le projet de novembre 1981 était rendu public.

Les sections suivantes offrent un aperçu des principaux changements qui touchent le ministère :

Les programmes du MIC visant l'industrie, la production industrielle et le tourisme, ainsi que les programmes régionaux du ministère de l'Expansion économique régionale, sont fusionnés en un seul ministère fédéral. La fusion, qui débute au printemps de 1982, focalisera les politiques et programmes industriels du gouvernement venant appuyer les stratégies de développement régional et fera en sorte que les bénéfices découlant de l'activité économique soient largement répartis dans toutes les régions du pays.

La responsabilité du commerce international du MIC est transférée au ministère des Affaires extérieures. Ce dernier pourra ainsi accorder une plus grande priorité aux objectifs commerciaux dans la conduite des relations

internationales, ce qui renforcera la faculté d'adaptation du Canada à l'évolution de la situation économique mondiale.

- La responsabilité du MIC vis-à-vis de la Commission du système métrologique Canada est transférée au ministère de la Consommation et des Corporations, ce qui correspond bien aux progrès de la conversion métrique enregistrés depuis le début dans l'industrie. La conversion portera désormais sur des secteurs qui touchent plus directement les consommateurs.

Depuis sa création en 1892 en tant que ministère du Commerce, l'histoire du ministère a été marquée par un processus continu d'adaptation et de croissance. À ses modestes débuts, le ministère ne comptait que 9 employés et disposait d'un budget annuel de 15 000 \$. Le ministère a grandi au rythme du pays et la croissance de ses responsabilités et de ses services s'est faite en fonction des besoins économiques. En 1969, le ministère du Commerce était fusionné avec le ministère de l'Industrie et du Commerce.

Le rapport d'activité du ministère de l'Industrie et du Commerce et de l'Expansion économique régionale pour l'exercice 1982-1983 commencera à faire état des répercussions découlant des changements les plus récents. L'intégration de la compétence sectorielle et régionale fournira une base solide pour une meilleure adaptation des politiques et programmes industriels aux besoins des régions, pour une exécution plus efficace des programmes dans toutes les régions et pour un meilleur accès des entreprises aux programmes fédéraux de développement industriel par tout le Canada.

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Son Excellence,
Le très honorable Edward Schreyer, C.C., C.M.M.
Gouverneur général du Canada

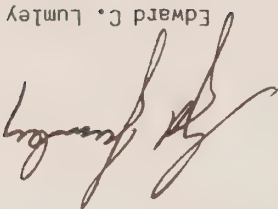
Votre Excellence,

J'ai l'honneur de présenter à Votre
Excellence le rapport du ministre de l'Industrie
et du Commerce sur les activités de l'exercice
financier se terminant le 31 mars 1982.

Votre Excellence trouvera dans ce
rapport l'analyse succincte des travaux exécutés
par nos divers services.

Je vous prie d'agréer, Votre Excellence,
l'expression de ma très haute considération.

Le Ministre de l'Industrie
et du Commerce et de
l'Expansion économique
régionale,



Edward C. Lumley

1981-1982

annuel

rapport

et Commerce

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1981-1982

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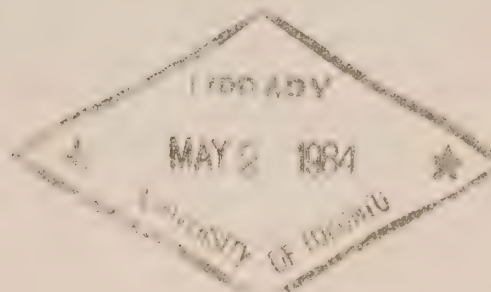
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Minister
Edward C. Lumley

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His Excellency

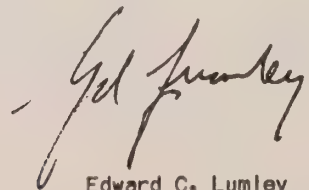
The Right Honourable Edward Schreyer, C.C., C.M.M., C.D.
Governor General of Canada

Your Excellency:

I have the honour to submit to Your Excellency the Annual Report for the Departments of Regional Economic Expansion and Industry, Trade and Commerce covering the period April 1, 1982 to March 31, 1983.

Your Excellency, you will find in this report, under appropriate headings, a summary of the accomplishments of the departments.

Respectfully submitted,

A handwritten signature in dark ink, appearing to read 'Ed Lumley', with a stylized flourish at the end.

Edward C. Lumley
Minister of Regional
Industrial Expansion

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INTRODUCTION

Following the Prime Minister's announcement in January, 1982, of the reorganization of economic development departments, the complex merger of elements of the Departments of Industry, Trade and Commerce and Regional Economic Expansion into an entirely new department began. The new department would be charged with the responsibility for delivering the Government's industrial and regional development programs.

During fiscal year 1982-83, an organizational structure was developed for the Ottawa office and the regional offices in each province. Every precaution was taken to ensure that this reorganization of human and program resources would take place with the least disturbance to client groups and to personnel.

Concurrent with the physical reorganization of the two departments, an extensive study was undertaken of the various industrial and regional assistance programs they delivered. This led to the drafting of legislation for a new Industrial and Regional Development Program which would replace most existing programs with an objective, equitable and flexible instrument to deliver industrial and regional economic assistance. While developing the new department, departmental personnel continued to administer and deliver existing programs of both departments.

The reorganization saw the headquarters grouped into seven units, each under the direction of an Assistant Deputy Minister or equivalent. In addition, five service units were established: Human Resources; Communications; Internal Audit; Legal Services; and Corporate Coordination Bureau. Across Canada, regional offices were strengthened and headed by Regional Executive Directors.

In accordance with Parliamentary requirements, financial statements for each department are shown separately. The remainder of the report reflects the departmental structures as they evolved during the fiscal year and describes the major activities of the two departments as they carried out their continuing functions while also developing the Department of Regional Industrial Expansion.

NATIONAL CAPITAL ACTIVITIES

The major activities of the merging departments have been described by location in the interest of clarity although it is noted that considerable interaction among the various elements normally occurred.

CAPITAL AND INDUSTRIAL
GOODS

The Capital and Industrial Goods sector was formed with five operating branches:

- Machinery and Electrical Equipment
- Electronics and Aerospace
- Automotive, Marine and Rail
- the Office of Industrial and Regional Benefits
- Market Development

The activities of the Technology Branch were dispersed to other responsibility centres.

MACHINERY AND ELECTRICAL EQUIPMENT BRANCH

Total production in the Canadian machinery and electrical equipment industry in 1982-83 fell 11 per cent in real terms to \$9.6 billion from a 1981-82 level of \$10.8 billion. On the average, the industry experienced severely reduced capacity utilization rates, down to 70 per cent from an average of 82 per cent in 1981. Virtually every sector experienced output declines, some marginally, others substantially. Exports of machinery and equipment were also down to \$3.9 billion, off 8 per cent from 1981-82 levels, and the total Canadian market was down 18 per cent, to \$15.3 billion from \$18.6 billion in 1981-82.

A review of the major areas of activities of the Machinery and Electrical Equipment Branch in 1982-83 includes:

Machinery Program

The Machinery Program continued to be a major branch activity. The program provides an industrial development incentive with the two-fold objective of:

- encouraging machinery manufacturers to derive maximum benefit from tariff provisions; and
- assisting machinery users to acquire advanced production equipment at the lowest possible cost through remission of duty on equipment not available from production in Canada.

The branch undertook an ongoing review of Canadian machinery manufacturing capability to assess duty remission applications from industry.

During 1982-83, 17 000 requests for duty remission were assessed under the Machinery Program. Duty

remission in 1982-83 amounted to an estimated \$300 million in net savings for machinery users in all industries. Duty remission on capital goods and production components used in the establishment of new manufacturing capabilities, in the installation of integrated production lines, and by automotive parts manufacturers, was provided to over 300 firms in the machinery and other sectors of Canadian industry. These remissions resulted in direct capital cost savings to manufacturers of \$32.5 million, and contributed to additional Canadian production of \$1.1 billion and an estimated 13 000 jobs in direct employment.

In 1982-83, the Machinery Program provisions assisted 36 companies to increase the range of machinery products manufactured in Canada. Production started on 34 new product lines previously supplied entirely by imports, resulting in \$86.7 million of additional manufacturing per year and over 700 new jobs.

Industrial Benefits from Domestic Market Opportunities

The branch identified market opportunities and assisted in the development of Canadian supply capability for machinery and electrical equipment. Activities included:

- support to the Committee on Megaproject Industrial and Regional Benefits;
- support to the Department of Supply and Services (DSS) in evaluating purchases of machinery and equipment exceeding \$2 million to identify potential Canadian suppliers;
- support to the federal/provincial Industry Modernization Program for the pulp and paper industry;
- identification of industrial opportunities arising from the Small Arms Replacement Project (SARP).

Sector Adjustment

The recession caused severe adjustment problems in the machinery and electrical energy equipment sector. Individual product sectors which showed steepest output declines in 1982-83 included: farm machinery; resource-based equipment, including forest handling equipment and mining equipment; machine tools; and some service industries equipment, such as commercial refrigeration, and plumbing and hardware equipment. The branch assisted firms to initiate

structural changes to improve long-term growth potential. Activities included:

- ° Initiatives towards rationalization and specialization arrangements for the production of products such as mechanical presses, paint-spray equipment, grass trimmers, computer-room air conditioners, garden tools, and label machinery;
- ° technical and market assessments on 20 projects including plant expansion/modernization, expansion of product line, and new production facility, under the Industry and Labour Adjustment Program (ILAP);
- ° monitoring and assessing the operations and impact of the Front End Wheel Loader Remission Order on the production and export of front end wheel loaders in Canada; and
- ° activities in connection with federal government support to several machinery and electrical energy equipment manufacturers undergoing major reorganization and restructuring and evaluation of 13 submissions for Enterprise Development Program adjustment loans.

Energy Equipment

The Electrical Equipment Division of the Electrical and Electronics Branch and the Energy and Environmental Equipment Division were integrated into the new Energy Equipment Division. This new division covers the mechanical and electrical equipment aspects of oil and gas, electrical generation, transmission and distribution. The division was involved in export market development and participated in a number of trade missions.

Innovation

During the year, the branch evaluated 45 cases under the Enterprise Development Program.

Analysis and Policy Development

Activities included an assessment of short-term employment layoff in the machinery and electrical energy equipment industry in Canada, a trade strategy paper on the machinery industry for the 1980s, a small business policy option paper for the machinery industry, the development of policy proposals for specialized mining equipment in Canada, individual country export marketing development plans covering strategic machinery products, and an overview of the machinery industry.

Export Promotion

The branch maintains an active program of promotional and co-operative events to assist firms take greater advantage of export markets.

The program included:

- ° approval of 100 applications under the Program for Export Market Development (PEMD);
- ° staffing of 15 trade fairs and 23 trade missions and organizing industry participation in them.

ELECTRONICS AND AEROSPACE BRANCH

Aerospace Directorate

The aerospace sector recorded sales of approximately \$3 billion for calendar year 1982. Employment showed some reduction from earlier levels. The industry continued to be predominantly related to export markets (approximately 80 per cent of output) thereby continuing to make a significant contribution to Canada's balance of trade.

Negotiations continued under GATT to expand the listing of aerospace items eligible for duty free treatment under the terms of the Agreement on Trade in Civil Aircraft.

The directorate participated in a number of major undertakings. These included: the analysis of possibilities for the establishment of a helicopter manufacturing facility in Canada; the development of a long-term corporate agreement with Pratt & Whitney Canada; and the activities of the Minister's Advisory Committee on Aerospace Development.

Under the Defence Industry Productivity Program, funding support for research and development, source establishment and plant modernization to the industry sector continued to be a major activity involving approximately \$58 million in assistance for 57 projects.

The uses of airships in Canada were considered by an interdepartmental committee convened by the directorate. Several suggestions are receiving further investigation and an airship was built near Toronto for test by the U.S. Navy.

Efforts were initiated to determine if new industrial opportunities exist to redress Canada's negative trade balance in light aircraft and continuing assistance was provided to firms already working in that market sector.

The directorate participated in projects to study the Dash 8 program and to formulate the federal/provincial program to provide a fleet of CL-215 water bombers for use in Canada. Co-operative projects were started with the U.S. Air Force to develop an air cushion equipment transporter and with the U.S. Navy and NASA to apply vertical/short takeoff and landing (STOL) technology to next generation attack aircraft.

Activity on existing programs included flight trials and demonstrations to military operators of the powered-lift Buffalo transport aircraft. Efforts were intensified to identify a foreign partner for a joint development/production program on Jet STOL transports. Development proceeded on a light air cushion triphibious aircraft with completion of a "proof of feasibility" program set for July 1983.

The CL-289 drone system entered its development, preproduction and production phases in conjunction with West Germany and France.

Electronics Directorate

Declining demand for electronics products resulted in growth of less than 6 per cent in industry shipments, down from annual growth rates of over 20 per cent in the previous three years. On a more positive note, industry exports increased more than imports so that high trade deficits in many commodity areas actually declined during the year. Impressive trade performances were turned in by the telecommunications and avionics/defence electronics subsectors, each of which closed the year with export growth of more than 33 per cent over the previous year.

The Electronics Directorate continued to support industry through a variety of mechanisms. The Support for Technology Enhanced Productivity Program (STEP), launched in early 1982, provided financial incentives to stimulate the production and use of advanced electronic technologies in manufacturing, processing and service industries across the country. Two new Microelectronic Centres (Centres of Advanced Technology) were opened in the Maritime region, bringing the total of such centres across the country to seven. The centres are designed to act as regional focal points for the dissemination of information on microelectronic technology and its applications.

The electronics industry continues to be an active participant in the Program for Export Market Development (PEMD). Many small and medium-sized firms were assisted in identifying and penetrating foreign markets for their products.

During the year, the directorate assisted in Canadian participation in a number of key international fairs and missions. The two most important trade shows in the computer and office automation subsectors were the National Computer Conference in California, and SICOB in Paris. In consumer products, a number of domestic manufacturers were assisted in attending the Domotecnica World Trade Fair in West Germany.

Further export marketing assistance to the industry was provided by sponsoring outgoing trade missions to countries identified as markets with high potential for Canadian products.

AUTOMOTIVE, MARINE AND RAIL BRANCH

Automotive Directorate

Despite serious difficulties encountered by the Canadian automotive industry due to the continuing downturn in the key U.S. market and fierce international competition, Canadian automobile manufacturing made a record level of new investment in plants and equipment. By the end of the fiscal year vehicle sales started to recover from a 10-year low reached in calendar year 1982. The vehicle companies had reduced inventories substantially in 1982, break-even levels had been reduced and the industry entered the final quarter of the fiscal year with a stronger production schedule which reduced the number of workers on layoff.

Department officials led a delegation to Japan to open discussions with the Japanese government on industrial co-operation, seeking a greater commitment by the Japanese to investment and parts sourcing in Canada. Department officials continued to be involved in discussions with Japan with respect to export restraint. In August 1982, the Japanese government announced its intention to limit exports of passenger cars to 63 000 in the period from July 1, 1982 to December 31, 1982 resulting in a calendar year level of 153 000 units. In February 1983, the Japanese and Canadian governments reached an interim understanding under which Japanese passenger car exports would be limited to 79 000 in the period January 1, 1983 to June 30, 1983.

In December 1982, a private sector Task Force on the Canadian Motor Vehicle and Automotive Parts Industries was established. The department participated in the task force in an ex-officio role.

The Task Force was established to review the development, competitive environment and position of the Canadian automotive manufacturing industry

and to make recommendations that will assist the Government in identifying priorities and formulating policies to support industry initiatives which will contribute to a competitive automotive manufacturing capability in Canada.

The branch processed applications under the ILAP automotive parts program introduced the previous year.

The branch promoted export opportunities for Canadian auto parts and vehicle manufacturers and made intensive efforts to promote joint ventures to increase exports. They also sponsored trade missions and participated in trade fairs. Export efforts in the automotive parts sector were supported by the duty remission program operated by the branch.

Investment promotion activities resulted in an announcement by Toyota Motor Corporation to establish an automotive aluminum wheel plant in the Tilbury Island Industrial Park in British Columbia. The wheel plant is the first investment in manufacturing by a Japanese vehicle manufacturer in Canada, representing an investment of \$23 million by Toyota.

Marine, Rail and Urban Directorate

Marine Systems Division

There was a steady level of activity in the ocean industries as exploration continued in the Beaufort Sea and off Atlantic Canada. However, the shipbuilding and repair industry slowed markedly, reflecting worldwide conditions, as new commercial orders failed to materialize. Layoffs in the shipyards were widespread and often severe. Manufacturers of marine components also felt the shortage of orders.

The Shipbuilding Industry Assistance Program (SIAP) continues in effect and subsidies are available on all ships completed before July 1, 1985. There were few applications due to the shortage of new contracts.

Market development support was provided through national displays at the Offshore Technology Conference in Houston, Texas; the Offshore Northern Seas in Stravanger, Norway; and the Oceanology International show in Brighton, England; as well as information booths at a number of other international shows.

With respect to industrial benefits from government procurement, the directorate participated in the program office created for the acquisition of the Canadian Patrol Frigate by

providing management of the industrial benefits function.

Railway Division

While the railway supply sector continued to suffer from low domestic demand, the department maintained its efforts to exploit export markets. Incoming and outgoing missions were organized and/or supported for major potential markets and demands for PEMD assistance increased.

Major export successes included EDC and CIDA financed sales to Indonesia (\$50 million) and Brazil (\$50 million). Canadian firms were shortlisted for \$477 million worth of locomotives, technical assistance and construction in Algeria and a bilateral railway protocol agreement is in process. Canadian companies are also shortlisted for \$400 million in railway requirements for Nigeria.

The major R&D project in the railway sector was the development of the high technology Bombardier diesel locomotive. This seven-year, \$54 million project under the Enterprise Development Program is proceeding on schedule.

In co-operation with the regional offices, several projects for the development of various railway equipment were instituted. These included the possible development of a track geometry car, more efficient snow removal equipment and a high-speed undercutter and ballast cleaner.

Among ongoing projects, the division continued to work with industry and other departments on railway electrification. Construction of an electrified railway line in B.C. proceeded and the manufacturing of Canadian-built electric locomotives commenced.

Plans were laid for utilization of the Western Transportation Development Initiative Program which, as an important adjunct to the Crow rate solution, would encourage railway source establishment in Western Canada.

Urban Transit Division

Canadian urban transit manufacturers continued to achieve success in domestic and export markets, generating sales of approximately \$2.3 billion. The branch continued its role in export promotion, sponsoring trade missions and other activities. Assistance under PEMD was provided to exporters, and industrial development was supported through the EDP, including ongoing assistance to Ontario Bus Industries for development of a downsized transit bus.

Marketing assistance provided by the branch was a factor in a number of industry export successes. Major orders were secured in Detroit and Chicago for rail cars and transit buses. In addition, federal export financing assistance was provided for a Bombardier contract for a \$700 million subway car order to be supplied to New York City. This was the largest export sale of Canadian transit system technology. The department was instrumental in ensuring Canadian firms were qualified to bid on the Singapore mass transit system. Canadian companies have been prequalified for over \$500 million worth of products.

TECHNOLOGY BRANCH

During the year, contributions were made to one Industrial Research Institute (IRI), five Centres of Advanced Technology (CATs) and three Industrial Research Associations (IRAs) under the department's Institutional Assistance Program. Under this program, universities, provincial research organizations and industrial groups are encouraged to establish a capability to undertake relevant research and development projects for industry and provide technical advice and services. Seven IRIs, six CATs and four IRAs established across the country under the program in earlier years are now self-sustaining through income from the sale of services to industrial firms and other clients. In 1982-83, one new CAT was established: the Atlantic Coal Institute at the University of Cape Breton. One new IRA was also established: the Canadian Plastics Institute in Toronto.

Financial assistance was also provided by the department to two innovation centres. One affiliated with the University of Waterloo and the other with Ecole polytechnique de Montréal. These centres evaluate inventions and assist in the commercialization of new products and the establishment of new technology-based companies.

Under the Technological Innovation Studies Program, grants were awarded to 15 university researchers to carry out studies in such areas as techniques for managing technology transfer in small business, biotechnology and the economic possibilities for Canada, and constraints to automating in Canadian manufacturing industry. Several detailed case studies of technology-based firms were also developed to provide a greater understanding of technological innovation management. The results of these projects are used by the department to develop policies, promote industrial innovation in Canadian industry, enhance productivity and competitiveness, and familiarize university

facilities with current industrial needs and opportunities.

OFFICE OF INDUSTRIAL AND REGIONAL BENEFITS

The Office of Industrial and Regional Benefits helps Canadian businesses take advantage of the opportunities promised by major project activity in Canada. The office has targeted projects with an aggregate value of \$100 billion for priority attention. Procedures have been launched to make these and other projects fully accessible to competitive Canadian manufacturers and service companies.

The office is the focal point for consultation with the private sector on industrial and regional benefits issues related to major projects. It works closely with provincial governments on industrial benefits and, through the Canada Oil and Gas Lands Administration, advises the federal government with respect to the industrial benefits provisions of the Canada Oil and Gas Act.

The office consults with owners and sponsors of major projects to ensure that Canadian firms have full and fair access to major project opportunities. It encourages project sponsors to develop procurement policies in line with the government's industrial and regional benefits objectives and to put in place suitable organizational structures for carrying out these policies. It helps to identify areas where Canadian capability is most competitive, as well as areas of potential Canadian capability that merit development by sponsors.

The office supplies analytical and administrative support to the Committee on Megaproject Industrial and Regional Benefits. This committee has representatives from provincial and territorial governments and other key federal departments, and serves as a wider forum for consultation with project sponsors. The committee held fourteen meetings with major project sponsors during the year. Projects discussed included oil and gas developments in the Beaufort Sea, the High Arctic and off the east coast, as well as an upgrading project and conventional oil production scheme. These meetings, together with numerous, more informal contacts between the office and major project sponsors, increased opportunities for Canadian suppliers. With the office's encouragement, a growing number of project sponsors developed procurement policies that give full consideration to the competitive capabilities of Canadian firms.

MARKET DEVELOPMENT BRANCH

The Market Development Branch has broad departmental responsibility for domestic marketing, as well as specific responsibilities within the Capital and Industrial Goods area for marketing generally. The branch coordinates sector and regional departmental initiatives, and undertakes horizontal activities to increase the Canadian market share served by domestic industry.

The Canadian Marketing Opportunities Program (CMOP), which supports source establishment by the private sector, and the Institutional Marketing Program (IMP), which makes known to industry the opportunities presented through public purchasing (including hospitals, educational institutions, etc.), plus a number of other departmental activities are being integrated into a broader "Shop Canadian" thrust.

The branch also provides import analyses through the Import Analysis Division (IAD), and interfirm comparisons through the Productivity Improvement Division (PID). In 1982-83, the branch completed 24 import analyses on over \$300 million worth of imports. Productivity studies were undertaken for 200 firms in 10 different sectors. The branch operates the Business Opportunities Sourcing System (BOSS), which has listings for some 14 000 firms. The service is used by trade commissioners abroad to locate Canadian suppliers that might service export opportunities and by provincial governments, Chambers of Commerce, and private firms to locate domestic suppliers.

CONSUMER GOODS, SERVICES AND RESOURCE PROCESSING

The Consumer Goods, Services and Resource Processing (CGSRP) group brings together eight elements of the IT&C organizational structure:

- ° the Resource Industries Branch;
- ° the Chemicals Branch;
- ° the Food Branch;
- ° the Office of Service Industries;
- ° the Textile and Consumer Products Branch;
- ° the Grain Marketing Office;
- ° Design Canada; and
- ° the office of primary interest for the Industry and Labour Adjustment Program (ILAP).

Late in the fiscal year, these elements were consolidated into a new organizational structure consisting of six branches:

- ° Resource Processing Industries (including chemicals);
- ° Service Industries;
- ° Food and Consumer Products Industries;
- ° the Office of Industrial Adjustment (including textiles, clothing and footwear, design and the ILAP program);
- ° Policy, Planning and Analysis; and
- ° the Grain Marketing Office.

The number of branches was reduced to five with the transfer of Grain Marketing to the Department of External Affairs on March 4, 1983.

The following sections review the 1982-83 activities of these branches, with the exception of Policy, Planning and Analysis which was still being organized at the close of the fiscal year.

RESOURCE PROCESSING INDUSTRIES BRANCH

The branch covers chemicals, forest products and metals and minerals. In 1982, shipments by the resource-based industries totalled \$68 billion. Exports were \$31 billion and imports \$15 billion.

Chemicals Directorate

Plastics, Rubber and Chemical Specialties

Despite experiencing a difficult economic period in 1982-83, the synthetic resins and plastics products industries together exported 3 per cent more in value than in the previous year. Imports dropped by 8.5 per cent, with the result that an improvement in the negative trade balance of 11.5 per cent, or \$144 million, was realized.

Financial support to establish a Canadian Plastics Institute to assist the plastics industry keep pace with technological advances, realize productivity gains and continue to create substantial employment was provided.

Petroleum and Industrial Chemicals

The Interdepartmental Task Force on the petrochemical industry completed its report in October 1982. Subsequently, the Government announced an offer of short-term assistance to two oil-based petrochemical producers, pending the development of a long-term policy for the industry. The task of developing recommendations for a long-term policy was charged to an industry/labour task force, appointed by the Minister.

The Chemicals Branch participated in meetings of the International Rubber Study Group (IRSG), an organization of national governments which acts as a forum for the exchange of information between natural and synthetic rubber producers and consumers. Canada is an important producer of synthetic rubber.

Involvement in the activities of the Sulphur Development Institute of Canada (SUDIC), a non-profit organization fostering research into new uses of sulphur, was continued through membership on the Board of Directors.

Health Care Products

The International conference on "Medical Device Technology in the 80s", co-sponsored by the department, Health and Welfare Canada and the Canadian Association of the Manufacturers of Medical Devices, was held in Toronto in December 1982.

To secure a greater share of the domestic market for Canadian producers, the department organized an industrial exhibition of Canadian-made health care products, held in conjunction with the medical device conference. Over 100 companies displayed their domestically produced products. Of particular interest was a section featuring the latest in medical device technology arising from Canadian hospital, biomedical and university research laboratories.

During the year, the branch organized exhibits of Canadian health care products in Trinidad and at the Canada Trade Centre in Tokyo.

Metals and Minerals Directorate

Metals and Minerals Processing

The division was involved in the Non-Ferrous Smelting Strategy Work Program proposed by Energy, Mines and Resources, under the guidance of the Consultative Work Group on Non-Ferrous Smelters. This latter group was composed of representatives from industry, labour, and intergovernmental groups.

The division led the Canadian delegation at meetings of the International Lead and Zinc Study Group to discuss the worldwide market situation for these metals, and was represented on the Canadian delegations to UNCTAD Committee meetings on tungsten and bauxite, acting as advisor on matters concerning marketing and further processing.

The division was active in market development on behalf of the coal industry, which continued to expand and diversify markets in 1982-83. Exports reached almost \$1.2 billion with shipments from B.C., Alberta and Nova Scotia to 18 countries in Asia, Latin America and Europe. Coking coal still accounts for nearly 90 per cent of exports; however, thermal shipments are increasing and considerable tonnage is now moving from Vancouver to Japan, Korea, Hong Kong and Europe.

In early 1983 a coal market survey was conducted in Finland, Norway, Sweden, France, the U.K. and Ireland. A major report was circulated to industry and governments.

Iron and Steel

The 1982-83 period represented the worst economic and market environments for the steel industry in more than three decades. With the industry retrenched and rationalizing its operations for the slower market climate it expects in the future, most requests for departmental assistance were for projects aimed at improving cost competitiveness and product diversification. Certain of these proposals involved leading-edge technologies, such as plasma arc generators and new ironmaking technologies, which may require several years of development before they become operational. Market growth opportunities were explored, including two industry requests for market research assistance to determine the feasibility of expanding regional capabilities to exploit import replacement or export market opportunities. The division initiated industry and market analysis as well, including a preliminary feasibility study for bar/wire rod operation in Western Canada.

The division dealt with a wide range of trade relations issues. Unfairly traded steel imports, often at levels injurious to domestic producers, resulted in a large number of anti-dumping investigations.

The division continued to be closely involved with the OECD Steel Committee Working Party, and a number of meetings of the committee were attended at which discussions were held on means whereby the crisis in world steel markets might be alleviated.

Fabricated Metals and Construction Materials

The division dealt with an increasing number of trade-related problems during the year. The Canadian metal fabricating sector continued to be adversely affected by growing import competition from newly industrialized countries. During the

year, imports from Pacific Rim countries captured a greater share of the Canadian market with the focus on high-volume established technology products.

In response to requests from the private sector, the division organized ad hoc industry task forces to address particular problem areas. The actions arising from these discussions included the initiation of anti-dumping actions, and support for the Department of Finance in preparing the extension of Canadian customs jurisdiction to 200 miles. This last action has the effect of improving the accessibility to offshore megaprojects for Canadian components and supplies. In the United States, the major export market for fabricated metal and construction products, barriers to trade continued to cause difficulty for Canadian manufacturers: the trigger price mechanism reintroduced by the U.S. discouraged imports of stainless steel wire; the Surface Transportation Assistance Act blocked Canadian cement and steel products from participating in U.S. federally funded highway projects.

The Canadian metal fabricating industry was also concerned about the emergence of organizations such as the U.S. Metalworking Fair Trade Coalition and the Trade Reform Action Coalition. The division consulted with the companies concerned to coordinate responses to these problems.

In June 1982 the division issued a detailed directory of the Canadian iron and steel foundry industry, titled "An Inventory of Canadian Ferrous Foundry Capabilities", to assist purchasing agents and engineers to find Canadian sources to meet their requirements.

A market reconnaissance mission for a wide variety of fabricated metal products to Australia and New Zealand was conducted in co-operation with the Department of External Affairs. A number of potential market and joint venture opportunities were defined and forwarded to some 150 Canadian companies for direct follow-up.

Sector support was provided in the organization of the Canadian Building Products and Hardware Show in Trinidad. This show assisted Canadian companies to introduce new products to the market and promote those already established.

Forest Products Directorate

Primary Wood Products

The division jointly administers the Co-operative Overseas Market Development Program with the

British Columbia Ministry of Small Business Development, and the Council of Forest Industries of British Columbia. The program is directed toward expansion of offshore markets for Canadian softwood lumber, plywood, shingles and shakes. Overseas exports from Canada increased from \$245 million in 1970, prior to the first phase of the program, to \$1.4 billion in 1980, dropping to \$1.1 billion in 1982. The federal share of the 1982-83 program totalled \$1.9 million.

A major issue confronting the industry was the countervailing duty investigation by the U.S. Department of Commerce of Canadian softwood lumber, shingle and shake exports to the United States. The division worked with other federal and provincial departments and industry groups to assist the industry to respond to the investigation. The outcome was positive, Canada's access to its major market for these products remained unimpaired.

A significant number of trade promotion activities were organized and carried out during the year. Two missions, one of softwood lumber producers and the other comprising representatives of the hardwood lumber industry, visited leading Western European importers and end-users to expand sales to that important market. An incoming building materials buyers mission from Iceland was introduced to companies in Eastern Canada. The trade promotion activities resulted in export sales to new buyers.

Manufactured Wood Products

Canadian wood product manufacturers continued to pursue export market opportunities, in the United States and Europe in particular. This increased the division's trade fair activity, trade-related missions and requests for support for marketing under PEMD. The division supported the promotion of manufactured wood products in numerous trade shows.

In spite of the emphasis on their promotion, there was a significant decline in exports from a record \$450 million in 1981 to approximately \$350 million in 1982.

Some companies took advantage of the low level of business activity and used EDP assistance to develop new products and to upgrade their operations. Most notable among the projects which the division supported was the development of a unique approach to the construction of transportation, and on-site erection of prefabricated homes.

The concern over energy conservation and the shrinking supply of wood has led to increased interest in export markets not only in the Canadian timber frame residential construction technique but also in the Canadian supply of a wide range of manufactured wood products. Consequently, the division has spearheaded a number of activities, including a wood window mission from the U.K. and several housing component missions from West Germany. The division hosted a mission of key wood products standards and research officials from seven countries of the European Economic Community (EEC).

Pulp and Paper

The jointly funded federal-provincial Pulp and Paper Modernization Program continued in 1982-83, but at a slower rate. Some projects were rescheduled for later completion, others have been placed on hold, some cancelled. This reflects the worldwide reduction in demand for pulp, paper and paperboard products and resulted in a substantial drop in the cash flow of the Canadian forest industry. The division initiated a study of the program that will form the basis for joint action with the concerned provinces to accommodate the changed economic circumstances. In both primary and secondary (converting) sectors of the industry, the technical and marketing expertise of the division was used in the study and implementation of major new industrial projects in Canada.

The division continued to serve on international development committees that promote technical expertise exchange, and foster trade and investment among nations including Japan, OECD, Cuba and the multinational Customs Co-operative Council.

During the year, the division stressed converted paper products, packaging and packaging material and sought export market opportunities for these goods. Of significance to this effort was the completion, in early 1983, of the consultants' report on packaging and packaging materials export opportunities to the California market.

FOOD AND CONSUMER PRODUCTS INDUSTRIES BRANCH

Consumer product industries are an important economic factor in every province in Canada. Export growth has assumed increased importance in recent years particularly as demographic factors increasingly limit growth in some sectors. Coupled with the need to develop export markets is the need to increase efficiency and productivity through restructuring and technological

adjustments to maintain and improve competitiveness.

The branch continued to promote PEMD-Food as a tool to expand and develop export markets for food and agricultural products. Industrial development needs of the sectors were pursued through the Enterprise Development Program. Activities have included product and process development, productivity enhancement and corporate restructuring. This is especially true in the east coast fishery and has resulted in the approval of a number of loan guarantees to assist in restructuring of fish processing operations. In addition, the branch assisted companies under the Industry and Labour Adjustment Program.

Plant Products

The Promotional Projects Program of External Affairs was used extensively by the division to develop and expand markets for corn, forage seed, seed potatoes and feed.

The division organized an incoming tour for seed company representatives from Japan in September 1982, to make them aware of Canada as a potential source of short season corn hybrids. The division also organized technical seed potato missions from Spain, Hungary and Panama. As a result, Canadian suppliers have regained entry into the Panamanian market after several years' absence, access into Hungary, and a reinforced presence in Spain.

The division attended the OECD seed scheme annual meetings accompanied by representatives from Secan, Canadian Seed Growers Association and Agriculture Canada. At the same time several agricultural authorities in the EEC were visited to gain information on testing and licensing requirements for seed varieties and to learn more about potential markets for Canadian varieties.

The department supported two promotional projects undertaken in Japan by the alfalfa dehydrators in Western Canada. In compound feeds, the division organized an incoming animal feed mission from Mexico in conjunction with the Canadian Feed Industry Association.

Animal Products

The promotion of breeding cattle, swine, semen and embryos was maintained, including exhibits at the Salon International de l'Agriculture in France, the Royal Highland and Royal Agricultural Shows in Great Britain and the Royal Easter Show in Australia. Missions to and from the southeastern U.S. were successful in developing sales of breeding stock and numerous incoming buyers from

many countries were brought in touch with Canadian livestock producers and exporters.

Co-ordination of requests by foreign buyers for the sourcing of various dairy products was carried out and high levels of export sales were maintained. The department continued to explore markets for beef, pork, processed meats, meat by-products, poultry and poultry products, horsemeat and furs.

Fishery Products

The division coordinated participation by the fishing industry in a number of incoming and outgoing missions, trade shows and promotions. These included a saltfish mission to Brazil; incoming buyers' missions from Australia, Egypt, Greece and Nigeria; and participation in Saudi Food '83, Salon International d'Alimentation (SIAL) France, the National Restaurant Association (NRA) Show and Seafood '83 in the United States.

Although total exports of Canadian fish products increased from \$1.5 billion in 1981 to a new record of \$1.6 billion in 1982, the Canadian fishing industry underwent serious economic difficulties. The division contributed to the work of the Task Force on the Atlantic Fisheries, through participation on its committees and through the preparation of briefs. The division was also involved in the financial restructuring of fish marketing co-operatives.

Development of a directed fishery to export large quantities of mackerel to Nigeria or other African countries was undertaken using specially developed consortia in the Atlantic provinces. These resulted in a bulk shipment of almost 2 000 tonnes of mackerel worth \$1.5 million. The PEMD program was used to assist in developing the logistic collection system which increased processing and export of this underutilized species.

Grocery Products

Through a series of promotional events in Europe, the United States and Japan, a new concept in promoting Canadian companies was introduced. An AES system was set up at trade shows to list Canadian food processors for interested importers. Two trade posts, Japan and France, are utilizing this system for answering inquiries.

Consumer-oriented promotions over the last year included in-store promotions. This co-operative marketing effort was undertaken with Seiyu-Stores (Japan) and Safeway Stores (Western U.S.) and was designed to promote processed foods. Point-of-purchase display and sampling of Canadian products helped to create an awareness of Canadian processed foods in these international markets.

Leisure Products

Traditionally, the leisure products industry sector is one of the last to feel the effects of economic recessions and the impact is usually not as severe as for other manufacturing sectors. However, in 1982, the sector felt the full impact of the economic downturn as shipments in current dollars declined 1.6 per cent to \$9.1 billion. Individual industries which showed the steepest declines in 1982 were sound recordings (-17 per cent) and sporting goods (-11 per cent). Toys and games and motion pictures showed increases in shipments of about 8 and 7 per cent respectively over 1981 levels. The decline in production at the sectoral level was accompanied by a drop in employment estimated at 3 per cent to about 142 000. Early indications in 1983 are that the sector is recovering from the recession.

Because of the poor economic climate, many manufacturers of leisure goods sought financial assistance under departmental programs. The commercial printing industry in particular was a major user of the Regional Development Incentive Program. In conjunction with the Department of External Affairs, the department has sponsored a national stand at seven international trade fairs in four countries (United States, England, West Germany and Italy), and organized three solo shows in Japan and incoming buyers' missions from the United States, Australia and New Zealand.

Furniture

In 1982 total furniture shipments amounted to \$2.3 billion, a decrease of about 16 per cent compared to 1981. However, Canadian manufacturers increased their share of the domestic market as imports of furniture products decreased 37 per cent from \$344 million in 1981 to \$250 million in 1982. Exports increased 9 per cent from \$279 million to \$306 million during the same period.

Assistance provided under the departmental incentive programs enabled a number of manufacturers to undertake restructuring, productivity improvement and design projects.

With assistance from the department, the business furniture sector participated in solo shows in Minneapolis, Boston, Seattle and Atlanta. Exports of office furniture in 1982 were \$166 million, or about 35 per cent of factory shipments.

Residential furniture manufacturers continued to participate in the Southern Furniture Market in North Carolina. In addition, the department continued its program to increase sales in the

greater New York City area by participating with the industry in the New York Furniture Market.

SERVICE INDUSTRIES BRANCH

The Service Industries Branch is responsible for the department's co-operation with the service sector of the Canadian business community. The branch participated in activities covering the wholesale and retail trades, merchandising services, construction, renewable energy, consulting firms and a variety of transportation and traffic services.

Distribution Services Division

Following the Distributive Trades Consultative Committee Report, completed in April 1982, the division initiated the preparation of a federal response to the report's 71 recommendations.

The division increased its efforts to enhance world markets for Canadian distributors. A study was undertaken in co-ordination with the Co-operative Union of Canada to assess the possibility of using the international co-operative network as a means of opening new international markets for Canadian co-operatives. The study included trade identification missions to Europe and southeast Asia, consultation with member organizations and consultation with government departments.

A productivity measurement system for retailers was developed and tested by the division in 1982. In early 1983, a consulting firm was engaged by the Service Industries Branch to develop an information package for distribution to retail firms wishing to adopt the system.

Construction Division

The Construction Division activities focused on increasing the productivity, efficiency and export trade performance of the construction, real estate development and renewable energy industries. It also provided a full-time secretariat and support for activities of the Construction Industry Development Council (CIDC), which provides advice to the Minister.

Given the number of major issues facing the construction industry during the 1980s and beyond the CIDC formed a task force to produce a study of "The Decade Ahead", to be released in 1983-84.

Construction Division support of CIDC activities resulted in the formation of the Interdepartmental Committee on Non-Residential Construction. The work of the committee is to co-ordinate federal

government policy development and program implementation that may impact on the performance of the non-residential construction sector.

The division expanded its program of productivity improvement seminars, conducted in ten cities throughout Canada, aimed at improved management and planning of the on-site construction process.

A construction opportunities market survey of Hong Kong, Indonesia, Singapore and Thailand was undertaken. The division also organized an incoming industrial co-operation mission from Sweden, which focused on energy conservation in buildings and industrial processes.

As the departmental focal point for renewable energy, particularly solar energy, the division was actively involved in the interdepartmental Solar Programs Advisory Committee and in a review of the solar industry by Energy, Mines and Resources.

Consulting Services Division

The Consulting Services Division worked with firms and associations to overcome constraints facing the industry and to support efforts to increase the export of consulting services.

The Consultative Committee on the Canadian Consulting Engineering Industry submitted its recommendations to the Minister covering the following principal topics: the domestic opportunity, procurement policies and practices; the export opportunity, major project capability; research and development; regionalization and local preference; and engineering personnel. In preparation of the Government response, consultation has taken place with other federal departments responsible for the policy implications of each recommendation.

An export survey was undertaken based on 35 of the most active export firms in consulting engineering to determine the annual value of consulting contracts, the sectors and geographic regions involved, sources of financing, and actual and potential spin-offs.

In supporting the efforts of Canadian firms with international lending agencies, the division participated in meetings with representatives of the Association of Consulting Engineers of Canada with the World Bank, the Inter-American Development Bank in Washington, the UNDP in New York, and the African Development Bank in Abidjan.

Transportation Services Division

The division worked with individual shippers, shipping companies and industry associations to resolve specific transportation problems and to identify new market opportunities.

Maritime Transport

The section participated within the interdepartmental community dealing with issues such as the establishment of a Canadian merchant marine, the designation of a national carrier, defensive shipping legislation and the Shipping Conference Exemption Act.

The "Directory of Ocean Shipping Services" has been maintained and made available to shippers. The directory describes over 125 ocean shipping services to export markets from Canadian ports.

Air Transport

The interests of business travellers, shippers and the tourism industry continued to be the focus of the section's contribution to a number of air policy issues, including Canada-U.S. bilateral air services negotiations, domestic air carrier policy, STOL services. In the Toronto-Ottawa-Montreal triangle, and the review of international civil aviation policy. In addition, the section participated in an adequacy of transportation service levels project intended to form the basis for departmental involvement in policy and regulatory issues.

Traffic Services

Contributions were made to the formulation of a number of policies from the viewpoint of Canadian shippers and the industrial development of the traffic services industries. These included the U.S. valuation for duty of inland transportation costs, new federal regulations for the transportation of dangerous goods, development of a sector strategy on the freight forwarding industry in Canada, the resolution of the Maritime freight rate subsidies issue, and studies relating to the ramifications of Canada ratifying the U.N. Convention on International Multimodal Transport.

Surface Transport

The section participated in the monitoring of the Crow's Nest Pass freight rates question and was also active in the successful resolution of the U.S. licensing moratorium on Canadian motor carriers. It has kept informed of the entry of U.S. motor carriers into the Canadian market

through the Interdepartmental Committee on International Trucking Matters.

Trading Houses

The section headed a trading house mission to southeast Asia whose purpose was to introduce some of the participants to new markets, to expand the market knowledge of others, and to assist the participants in establishing foreign agents for the distribution of Canadian consumer and industrial goods.

The "Directory of Canadian Trading Houses" is also maintained by the section. This directory is distributed to business groups and members of the general public to help focus attention on the trading house sector.

Franchising

Franchising activity centred around the distribution of two information booklets, "Expanding Your Business through Franchising" and "How to Buy a Franchised Business", as well as the publication of a statistical report on franchising activity in Canada from 1976-81.

OFFICE OF INDUSTRIAL ADJUSTMENT

Textiles, Clothing and Footwear Directorate

In support of the policy announced in 1981 for the Canadian textile, clothing, footwear and tanning industries the directorate continued to be the focal point within the Government for the overall effort to restructure and modernize these industries, reduce community dependence on these industries and help affected workers in order to reduce pressures for special measures of protection.

The directorate contributed to the renewal of bilateral arrangements with low-cost and state-trading countries, assisted the various sectors in identifying and exploiting domestic and international market opportunities, advised the Canadian Industrial Renewal Board (CIRB) regarding industry adjustment assistance, collaborated with departments concerned on low-cost issues and imports and liaised with industry and private organizations.

Textiles

Business conditions worsened during 1982 causing further reductions in industry activity, employment and profitability. It was only during the last quarter of 1982 that evidence of improvement was noted, particularly in the home

urnishing sector. The overall market for textiles declined to some \$6 billion in 1982 representing a decrease of 15 per cent in dollar terms over 1981. Industry shipments fell by 1 per cent and exports declined by 9 per cent. Employment in 1982 dropped 15.8 per cent to 62 800 thousand workers.

urther to the announcement of the new government policy for the textile and clothing sectors, import restraint arrangements covering certain primary textiles were to be negotiated as soon as possible with 12 low-cost or state-trading suppliers. In 1982-83, the directorate contributed to the negotiations of bilateral arrangements with Uruguay (worsted fabrics) and Brazil (acrylic yarn). The directorate also evaluated requests for CIRB's financial assistance of 75 textile firms in 1982. In addition, the directorate monitored anti-dumping actions regarding polypropylene and nylon rope, synthetic ester twine and polyester filament fabrics for apparel manufacturing, and assessed the short and medium-term impacts of these actions on the industry and market.

Clothing

Real domestic product fell in 1982 by 15.3 per cent in the clothing industry and by 9 per cent in knitting. Consumer expenditures on clothing remained practically stationary but its relative share of total consumer expenditures fell. Employment suffered as well, with a decline over 1981 of 14.8 per cent in clothing and 10.2 per cent in knitting. Capacity utilized fell to 50 per cent, the lowest level in the last six years. Imports increased by 5.2 per cent in 1982 and were up by a further 13 per cent in the first three months of 1983. Exports, on the other hand, fell by 8.6 per cent in 1982 as compared to the previous year. Some improvement began to take place in 1983 with the index of real domestic product increasing by 8.2 per cent for clothing and 7.9 per cent for knitting in the first three months. Employment increased slightly and fewer workers were participating in the government's work sharing program than in the same period in 1982.

The directorate continued to provide CIRB with market and industry evaluations to aid in the processing of company applications for assistance. In 1982, applications for assistance were received from 124 clothing firms. For the renegotiation of bilateral arrangements with low-cost and state-trading countries, the directorate provided the negotiating teams with detailed perspectives of individual sectors and evaluations of market trends and participated in negotiations. In 1982-83, arrangements were concluded with India, Singapore, Pakistan, Hungary and Czechoslovakia.

As part of its continuing effort to increase industry interest and participation in the export market, the directorate participated in the organization of trade fairs and recruitment of exhibitors for several international export shows.

Non-Rubber Footwear

In 1982, the apparent market decreased by 11.8 per cent with the domestic industry's share declining from 42 per cent in 1981 to 40 per cent. Production at 34.1 million pairs of footwear suffered a decline of 15.5 per cent from the previous year. Employment fell by 14 per cent. All sectors showed declines. A bright spot was exports which increased by 12 per cent in 1982, with special purpose and athletic footwear contributing almost exclusively to the gain.

In 1982, 31 footwear and tanning firms applied for assistance under CIRB which required evaluation action by the directorate. To respond to the situation of the domestic leather footwear industry, the Government, in July 1982, applied quotas on imports of leather footwear, including vinyl, from all sources. The quota of 11.4 million pairs for 1983 was to run concurrently with that for non-leather, including canvas, of 35.1 million pairs and terminate on November 30, 1984. As a consequence of imposing this global quota, the directorate participated in compensation negotiations with the EEC and the United States.

DESIGN CANADA

Design Canada, responsible for promoting improved design in Canadian industry, supported the requirements of the National Design Council and implemented departmental programs.

Activities include:

- ° cost-sharing grants with the provinces through the Product Development Management Program (PDMP);
- ° holding design seminars for designers and companies;
- ° providing design advisory services to companies; and
- ° administering a scholarship program to upgrade the quality of design skills in Canada.

The design advisory service included departmental program cases, enquiries from industry, assisting other departments and working with the professional design community.

Twelve scholarships were provided for a total of \$155 850 to students in the industrial, interior and graphic design fields to advance their studies at Canadian and foreign universities.

Preparation for the 1983 Design Awards presentations in Ottawa on June 2, 1983 saw a total of 125 submissions received up to mid-January 1983, when the adjudications were held. The final selection of 19 winners was made late in February by the jury.

A conference on the impact of new technologies on productivity and product development was conducted in Vancouver with 350 company representatives participating in the two-day event.

The National Design Council conducted three statutory meetings and a number of committee meetings on education and other issues.

A national lighting design competition was launched by the National Design Council in co-operation with industry and 200 designs were received from across Canada. Award winners will be announced in June 1984.

Industry and Labour Adjustment Program

This program is designed to reduce the distress in communities caused by permanent large-scale industrial dislocations and associated layoffs of area workers. The program has two components: the Community-Based Industrial Adjustment Program (CIAP) encourages firms to undertake viable capital projects in designated Canadian communities affected by serious industrial dislocations; and the Industry-Specific Restructuring Program (ISRP) provides assistance to two industry sectors, automotive parts and major household appliances, and assists small and medium-sized firms in these sectors to undertake viable job-creating projects. The designations of both communities and industries are for specific time periods.

Under the Community-Based Industrial Adjustment Program, a total of 12 communities in different regions of the country were designated eligible for federal aid. During the past year, the period of eligibility for four of the communities terminated leaving eight still eligible for program benefits. There were 112 projects approved under this program during the year involving \$40.6 million in commitments. Under the Industry-Specific Restructuring Program, 47 projects were approved.

GRAIN MARKETING OFFICE

Large crops, strong world competition and improved efficiencies in the Canadian handling and transportation system were features of the past year for the grain and oilseeds sector. Exports of the major grains, oilseeds and products increased from \$6.1 billion in 1981 to \$6.3 billion in 1982.

Exports of major grains, oilseeds and products in 1982 were:

- wheat - 19.2 million tonnes (\$4.3 billion);
- barley - 5.7 million tonnes (\$886 million);
- corn - 715 thousand tonnes (\$113 million);
- rye - 451 thousand tonnes (\$72 million);
- oats - 82 thousand tonnes (\$16 million);
- wheat flour - 308 thousand tonnes (\$110 million estimated); and
- major oilseeds and products - 2.3 million tonnes (\$800 million estimated).

This represents an increase of almost 14 per cent in the total export volume of these commodities compared with 1981.

The office sponsored five incoming missions and three technical seminars in existing and potential import countries. Canadian firms planning visits to potential import countries were given support information. Major developments included a long-term government-to-government agreement with Brazil for the sale of 3 to 4.5 million tonnes of wheat between January 1983 and December 1983. Over one-third of wheat exports as well as substantial barley sales were realized under the Credit Grain Sales Program administered by the office. In the context of continuing export co-operation, discussions were held with the major grain exporting countries to review developments in world trade.

Expansion of canola crushing capacity continued with the opening of a new 600-tonne-per-day facility in Manitoba in mid-1982. A new 600-tonne-per-day facility is expected to commence operation in Ontario in mid-1983. A new refining facility to be constructed in Alberta will provide an additional 320 000 tonnes refining capacity for the industry. Refining operations at this location are expected to commence in the fall of 1984. Approximately 2 million tonnes of oilseeds were crushed in 1982.

Cash advances to producers under the Prairie Grain Advance Payments Program declined slightly to \$309 million from the record of the previous year. As a result of this reduction and a general easing in interest rates, interest costs borne by the

Government declined by \$1.1 million to \$1.6 million.

The POS (Protein, Oil and Starch) Pilot Plant Corporation experienced its greatest utilization to date. A number of projects with significant commercial potential were completed. Negotiations were initiated with a major food firm for use under a royalty scheme of one of the resulting products which has diet food applications.

The Canadian International Grains Institute offered a total of 13 courses during the year. These included seven for participants from overseas and six domestic programs. Since 1971, people from over 70 countries have participated in international programs designed and conducted as part of Canada's market development plans for the grains and oilseed industry. The Grains Institute is funded jointly by ITC/REE and the Canadian Wheat Board.

The Grain Marketing Office sponsored incoming oilseed missions from Japan, Venezuela, India and Yugoslavia, while technical seminars were held in Venezuela, Norway and West Germany. In addition to the incoming delegations, the annual Canada-Japan consultations were held in Winnipeg. The Canada-Algeria canola oil supply contract entered its second delivery phase, calling for delivery of 70 000 to 100 000 tonnes of canola oil during 1983. The contract was facilitated by market promotion work, including technical seminars, conducted by the Grain Marketing Office.

The Western Grain Stabilization Administration reported that gross receipts from eligible prairie grain sales for calendar year 1982 totalled \$2.9 billion, some \$350 million lower than gross receipts recorded in the previous year. However, even with lower gross receipts and net cash flow, a larger volume resulted in a 1982 cash flow above the average of the net cash flow in the previous five years. Thus, there was no payout from the Western Grain Stabilization Fund for 1982. The Department contributed to the fund at the rate of four per cent of those gross receipts on which producers paid levy in accordance with the Western Grain Stabilization Act.

In the light of anticipated freight rate changes stemming from Bill C-155, a freight assistance program directed toward the canola processing industry in Western Canada and funded at \$1 million annually since 1976 was not extended on expiry on March 31, 1983.

The Program for Export Market Development (PEMD) is used primarily to provide assistance in trade

promotion and market development for a variety of oilseed projects including a food oil campaign and a canola growers' mission for Japan, and a trade fair exhibit in Algeria.

REGIONAL AND INDUSTRIAL POLICY

The mandate of this area is to develop and formulate policy recommendations and direct specialized analytic and policy skills in the areas of small business and economic intelligence, futures research, strategic planning, the impact of trade policies on industry and relations with other departments in the economic field.

There are two units, an Industrial Development Policy Branch and a Regional Industrial and Trade Policy Branch.

INDUSTRIAL DEVELOPMENT POLICY BRANCH

A major initiative of the branch was the work in developing the new Industrial and Regional Development Program (IRDP). In addition to the development of the program itself, a major contribution was the formulation of a development index to serve as an objective, equitable basis for determining the levels of assistance under the program depending on geographical location.

Based on the level of unemployment, income per person in each census district and the fiscal capacity of the provinces, the index determines differing levels of assistance in the regions of the country. This index is maintained by the branch and updated annually.

Ongoing statistical responsibilities of the branch include: preparation and analysis of indices of the utilization of industrial capacity; the semi-annual survey of business investment; and the annual survey of foreign-owned subsidiaries.

Other work in the area of cost/benefit analysis included completion of the Manfor project study, and a financial and cost/benefit analysis of a proposed pulp and paper project in northern Manitoba. As well, work continued on the preparation of an evaluation assessment manual.

During 1982-83, work supported a proposal to create a productivity centre. As well, a proposal to recognize outstanding achievements in design, productivity and innovation was made and work that resulted in redefining the role and mandate of the

Federal Business Development Bank was contributed.

REGIONAL INDUSTRIAL AND TRADE POLICY BRANCH

The branch has four directorates.

The Industrial Trade Policy and Analysis Directorate assesses the industrial and regional development impact of various export and import policy issues and brings regional and sectoral industrial perspectives to bear on the formulation of trade policy in the Government. A co-ordinating role is performed by the directorate for departmental positions on cross-sectoral or cross-regional interests.

Over the year trade policy issues were many and varied. The directorate worked with External Affairs in the development of "Canada's Trade Policy for the 1980s" and on numerous bilateral and multilateral trade issues. To fulfill its mandate the directorate responds on a day-to-day basis to trade issues arising in other departments and in international forums such as the GATT and the OECD. The directorate also has a project orientation which currently includes an analysis of the relationship between regional development and trade; and participation in the study of potential Canada-U.S. sectoral free trade and of the potential for free trade zones in Canada.

The Regional and Industrial Policy and Analysis Directorate concentrated on the departmental planning systems, contributing to developing national and regional industrial policy, in consultation with the department's regional offices and industry sector branches. The directorate conducted a study on the regional designation of departmental programs and contributed to the formulation of the development index. In addition, it served as a source of regional intelligence and provided regional input on a broad range of policy issues intra-departmentally.

The Industrial Adjustment Policy and Structural Analysis Directorate maintained the departmental econometric model and produced a number of medium-term economic projections used in the departmental planning process, as a base from which to do policy impact work, and as an input to occupational forecasting carried on by the Canada Employment and Immigration Commission. Considerable work was directed toward assessing industrial adjustment policy actions both nationally and internationally with a view to facilitating future industrial adjustment in the Canadian economy.

The Short-Term Economic Analysis Directorate provides advice and analysis of the current and short-term state of the Canadian economy on its own and in relation to the U.S. and other major OECD economies. This includes analytical assessments of historical developments and short-term prospects in private consumption, business investment, government expenditures and program initiatives, and merchandise trade performance.

The directorate also provided analytical evaluations of Canada's competitive position, merchandise trade position and balance of payment position in relation to our major markets, especially the United States and the Pacific Rim countries. With respect to regional developments the directorate coordinated inputs to provincial economic prospects and forecasts and initiated periodic reports of regional economic conditions as they relate to departmental programs.

SMALL BUSINESS SECRETARIAT

The Small Business Development Policy Directorate was involved in the development of several national initiatives to improve the economic climate and prospects of the business sector. These include the Small Business Investment Grant Program, announced in the June 1982 budget; and the extension of the Small Business Bond Program to December 1983, announced in the Minister of Finance's economic statement of October 1982.

The secretariat identified and analyzed key issues confronting small and medium-sized businesses and provided a small business perspective to broad policy exercises within ITC/REE and for other departments. The secretariat represented the Canadian Government at the International Conference on Small Enterprise Policy held in Osaka, Japan in January 1983.

The secretariat published three studies on the circumstances surrounding business insolvency including factors leading to bankruptcy and a comparison of the legislative framework surrounding bankruptcy in Canada and the United States. Support was also given to the British Columbia Institute of Technology to prepare a manual on export marketing to guide small businesses.

The Operations Directorate provided support for the Minister's Small Business Consultative Committee, established in September 1982. The Committee is made up of 22 representatives of small business, banking, academe, associations and other fields of expertise.

Under the Management Excellence In Small Business program, administered by the Operations Directorate, 58 proposals were recommended and subsequently approved for assistance by the advisory panel. Approved proposals for \$416 850 were for the development of course material, research and scholarships.

The Advocacy Office organized meetings with, and provided support to, the 16-member interdepartmental Committee on Small Business.

Relations between Government and small business suppliers were enhanced by the introduction of a prompt payment policy applicable to all government supply contractors. The secretariat worked with the Office of the Comptroller General in the design and implementation of the policy, which requires that government departments pay their suppliers within 30 days of fulfillment of the contract, or pay interest on the overdue accounts.

REGIONAL AND INDUSTRIAL PROGRAM AFFAIRS

PROGRAMS BRANCH

The Programs Branch is responsible for general management and control of the department's major funded industrial programs, including loans, insured loans, grants and contributions. The branch also administers the Small Businesses Loans Act under which guaranteed loans are provided by designated private lenders to assist small business enterprises. Financial assistance and support through loans, grants and guarantees provided by the department continued to be an essential factor in the stimulation and trade development of manufacturing and service industries in Canada during 1982-83.

The branch undertook or participated in a number of activities designed to improve the delivery of assistance to industry. Discussions aimed at greater consolidation of existing programs continued. Considerable progress was made in the development of methods for setting priorities among major projects. The branch developed an improved reporting system to attain better management of program budgets.

Improved forecasting techniques were utilized, together with increased management control of program commitments on a multi-year basis. The delivery systems were streamlined to attain more

efficient processing of project applications and prompter payment of claims.

The following is a summary of the activities during fiscal year 1982-83 for the principal programs administered by the department.

Enterprise Development Program

The Enterprise Development Program (EDP) assists manufacturing and processing firms to improve their viability and international competitiveness. It provides support by sharing project costs or providing insurance on term loans on a last-resort basis. During 1982-83, 104 adjustment assistance loan insurance projects, valued at \$104.1 million, were authorized (Table 1). It is estimated that this assistance will lead to the creation or maintenance of approximately 4 550 jobs during the next five years.

Table 1

Adjustment Assistance Loan Insurance Authorizations by Province/Territory 1982-83

	Number of Projects	Amount (\$ millions)
Newfoundland	1	0.1
Prince Edward Island	2	0.4
Nova Scotia	16	27.0
New Brunswick	6	7.4
Quebec	19	18.0
Ontario	34	44.3
Manitoba	10	1.4
Saskatchewan	-	-
Alberta	2	0.2
British Columbia	14	5.3
Yukon	-	-
Northwest Territories	-	-
Total	104	104.1

In addition, \$99.1 million in contributions were authorized towards the cost of 568 innovation and product development projects in such industries as machinery, electronics, ship components, automotive vehicles, building components and textiles (Table 2). The above totals for contribution projects include 149 STEP projects (Support for Technology Enhanced Productivity) with an authorized value of \$26.0 million. The STEP program is designed to enhance productivity in Canadian industry by encouraging the use of new

electronic dependent production, process and design technologies and use of microelectronics to improve quality and to create new products.

Table 2

**Innovation Authorizations under the
Enterprise Development Program
by Province/Territory 1982-83**

	Number of Projects	Amount (\$ millions)
Newfoundland	6	0.2
Prince Edward Island	5	0.4
Nova Scotia	19	1.0
New Brunswick	10	0.8
Quebec	272	22.2
Ontario	130	40.8
Manitoba	53	2.7
Saskatchewan	19	1.5
Alberta	23	2.6
British Columbia	31	26.9
Yukon	-	-
Northwest Territories	-	-
Total	568	99.1

Forecasts for the EDP contribution projects indicate sales of \$4.5 billion during the next five years and the creation or maintenance of 9 050 jobs.

Defence Industry Productivity Program

The Defence Industry Productivity Program (DIPP) provides financial assistance to industrial firms involved in the production of defence or defence-related products for export, in order to develop and sustain the technological capability of the Canadian defence and related civilian industries. The program operates under international agreements for defence development and production sharing.

A total of 155 projects were authorized during fiscal year 1982-83 for an authorized amount of \$181.2 million (Table 3). By program component, the totals comprised 29 R&D projects for a value of \$59.6 million, 84 source establishment projects valued at \$92.4 million, 39 capital assistance projects for \$28.9 million and three market feasibility studies for \$0.3 million. The bulk of the projects involved manufacturing firms located in the two central provinces.

Table 3

**Project Authorizations under the Defence
Industry Productivity Program
by Province/Territory 1982-83**

	Number of Projects	Amount (\$ millions)
Newfoundland	-	-
Prince Edward Island	-	-
Nova Scotia	2	1.4
New Brunswick	-	-
Quebec	45	58.4
Ontario	86	98.5
Manitoba	9	8.7
Saskatchewan	1	1.4
Alberta	2	1.1
British Columbia	10	11.7
Yukon	-	-
Northwest Territories	-	-
Total	155	181.2

Industry Energy Research and Development Program

The Industry Energy Research and Development Program (IERD) encourages the development of new and improved processes and equipment to reduce energy consumption in industry.

A total of 17 projects requiring total funding of \$10.7 million were authorized during 1982-83. Actual expenditures for the IERD program since inception to the end of 1982-83 totalled \$4.5 million with \$2.7 million being paid out in the past fiscal year.

Small Businesses Loans

The Small Businesses Loans Program, established under the Small Businesses Loans Act, makes term loans available to small Canadian businesses for a wide variety of capital improvements. The loans, guaranteed by the federal government, bear maximum interest rates of the charter banks' prime rate plus one per cent. The maximum term is ten years.

A total of 18 023 loans for \$458.1 million were made under the program in 1982-83 (Table 4) compared with 16 643 loans for \$491.9 million during 1981-82. Loss claims paid during the past year amounted to \$17.9 million, an increase of \$11.5 million over the previous year.

Table 4

**Loans under the Small Businesses Loans Act
by Province/Territory 1982-83**

	Number of Loans	Amount (\$ millions)
Newfoundland	205	4.8
Prince Edward Island	96	1.6
Nova Scotia	350	9.1
New Brunswick	481	11.9
Quebec	6 513	159.8
Ontario	3 688	100.4
Manitoba	523	12.9
Saskatchewan	1 093	29.1
Alberta	1 674	42.1
British Columbia	3 354	84.6
Yukon	28	1.0
Northwest Territories	18	0.8
Total	18 023	458.1

Small Business Investment Grants

The Small Business Investment Grants Program (SBIG) provides interest assistance for eligible loans taken out by small businesses. The form of assistance is a grant of up to 4 per cent per year on outstanding loans where the interest rate is in excess of 12 per cent. Assistance eligibility under the program is for loans taken out during the period June 28, 1982 to March 31, 1983 for the purposes of purchasing depreciable new property or to finance expenditures on scientific research.

The applications for assistance received under the program during 1982-83 totalled 5 751 for loans valued at \$359.3 million. Actual grants paid out during the year totalled \$1.3 million.

Shipbuilding Industry Assistance Program

The Shipbuilding Industry Assistance Program (SIAP) provides assistance to established shipbuilders engaged in the building and conversion of ships of specified minimum sizes. Assistance is also provided for projects designed to achieve productivity improvements in the shipyards.

During the past year, assistance was provided for 9 projects with an authorized value of \$6.4 million. Twenty-four of the projects with a value of \$23.4 million provided for the building and/or conversion of ships while there were 56

productivity improvement projects valued at \$13.0 million.

Institutional Assistance Program

The primary objective of the Institutional Assistance Program (IAP) is to provide financial support to non-profit institutions to develop and offer specialized services to industry and to individuals for studies which indirectly foster industrial development in Canada.

The program also provides grants for scholarships and studies in managerial or technological capabilities or for information that could assist the development of industrial policies.

For 1982-83, there were 40 projects approved under the IAP for grant assistance in the amount of \$2.7 million. The bulk of this assistance (\$2.2 million) was provided to non-profit institutions; or more specifically, university research facilities.

Industry and Labour Adjustment Program

Under a major program initiated by the federal government in January 1981, twelve communities in several regions of the country were designated during the past fiscal year as eligible for federal aid to alleviate unemployment. There were 169 projects approved under the Industry and Labour Adjustment Program (ILAP) involving committed expenditures totalling \$82.5 million. It is estimated that these projects will provide employment for 11 045 persons.

This program is designed to reduce the distress in communities caused by permanent, large-scale industrial dislocations and associated layoffs of area workers.

**REGIONAL AND INDUSTRIAL
PROJECTS AND CROWN
INVESTMENTS**

The two main responsibilities of the branch are the analysis, assessment and negotiation of major projects and the provision of support to the Minister in the discharge of responsibilities for certain Crown Corporations.

The branch has five directorates:

- Special Projects
- Development Projects

- ° Investment Projects
- ° Adjustment Projects
- ° Crown Investments

On the projects side difficult, sensitive and complex cases are undertaken. The selection of major projects is made in consideration of such factors as cost, complexity, sensitivity or urgency. Experience shows that major and sensitive cases need a level of analytical expertise not available in line organizations. Accordingly, the branch has been staffed with financial, economic and commercial analysts.

The branch's projects during 1982-83 concerned Canadaair, Airbus, Boeing, de Havilland, Pratt & Whitney company agreement, Minister's Advisory Committee on Aerospace Development, Electrolyser project, Malsin, White Farm, and Dome/Davie modernization.

Crown Investments was established to improve the management of the department's relationship with Crown Corporations. The Minister's responsibilities include the Federal Business Development Bank, the Cape Breton Development Corporation and Canadian Patents and Development Limited, which report directly, and the Canada Development Investment Corporation, the Canada Development Corporation and the Export Development Corporation, whose boards of directors include the department's Deputy Ministers.

The Crown Investments Directorate operates as a "holding company" for the management of the department's interest in the Crown Corporations reporting to the Minister, co-ordinating departmental relations with them and monitoring their strategies and business plans.

CANADIAN GOVERNMENT OFFICE OF TOURISM

The merger of Industry, Trade and Commerce, with Regional Economic Expansion saw the transfer of the former field staff of OGOT abroad to the Department of External Affairs. Within Canada, staff dedicated to the delivery of the federal tourism program were deployed among the 10 regional offices of ITC/REE, responsible to the Regional Executive Director concerned. Outside Canada, Trade Commissioners (Tourism) were designated at 14 DEA posts in the U.S. and DEA missions in the United Kingdom, France, West Germany, the Netherlands, Mexico, Australia and Japan. OGOT became responsible for giving

functional and operational guidance to all field personnel.

The office has three branches:

- ° Corporate Affairs
- ° Tourism Marketing
- ° Tourism Development

CORPORATE AFFAIRS BRANCH

The branch ensures ongoing research support in terms of supply, demand, cost-benefit and impact studies. It established a regional tourism database; plans, develops and recommends policy; monitors program activity operations; and acts as the focal point for government and industry relations through a co-ordination secretariat.

The Corporate Policy and Strategic Planning group provided advice and guidance on a wide range of policy issues during the fiscal year. Taxation was a priority area in its work program and together with the Tourism Industry Association of Canada, it surveyed tourism business perception of the impact of government.

Planning and Evaluation developed the federal input to a national tourism planning exercise involving federal and provincial governments and private industry.

The branch arranged the 1982 Conference of Canadian Tourism Officials and a federal-provincial conference on tourism. In addition they provided representation for Canada's participation on the Tourism Committee of the Organization for Economic Co-operation and Development, held in France during the year and headed Canada's delegation to the World Tourism Conference in August in Mexico.

A Tourism Operational Planning System was put in place to permit the planning, control and reporting on results of all OGOT projects.

TOURISM MARKETING BRANCH

Tourism marketing operations included:

- ° "Vacation Canada" advertisements placed in periodicals reaching over 70 per cent of all Canadian households.
- ° An estimated \$61 million of business was transacted at the sixth annual Rendez-vous Canada in Calgary, May 2-6, 1982 -- a decrease of \$2 million from 1981. This international marketplace attracted 336 Canadian sellers.

organizations, 220 foreign buying organizations and 29 international media representatives.

The "Canada: So Much To Go For" program, which encourages Canadians to travel in Canada, offered 50 competitively priced package tours in 1982. Partners with OGOT were Air Canada, CP Air, Pacific Western Airlines, Via Rail and Nordair.

TourCan, an annual domestic marketplace, was held in Saskatoon August 30 - September 2, 1982. The program was jointly sponsored by the Manitoba Department of Economic Development and Tourism and Saskatchewan's Department of Tourism and Renewable Resources. TourCan '82 provided the opportunity for sellers of tourism products from Manitoba and Saskatchewan to meet with wholesalers and operators from across Canada.

The computerized meetings and incentive travel data bank became operational, making detailed profiles of approximately 2 000 U.S. organizations available to meet in Canada directly available to the industry.

Approximately 500 association executives, meetings planners and incentive travel influencers visited major Canadian destinations through the site inspection program.

Significant progress was made in identifying needed improvements in policies and procedures of Canada Customs and Immigration in the accreditation of foreign meetings and conventions convening in Canada and the streamlined entry of their delegates into Canada.

A year-round consumer advertising campaign was conducted to create and maintain a positive attitude toward Canada as a vacation destination. Awareness/attitude advertising campaigns were implemented in the United Kingdom, West Germany, France, Holland, Mexico, Australia and Japan.

Significant extensions in reach of major campaigns resulted from intensive co-operation with industry partners, particularly with CP Air in Japan and Australia. A 16-page supplement was developed in France and co-scheduling by airlines and other partners was intensive in West Germany and Holland.

In addition:

market development work proceeded in South America, southeast Asia and southern Europe;

- consumer and trade publications in as many as eight languages were produced. Approximately eight million pieces of promotional literature and materials were distributed;
- nearly 200 promotional seminars in Canada, the U.S. and overseas were sponsored;
- some 400 media representatives from Canada, the U.S. and abroad were provided with Canadian tours;
- 100 travel features for publication in Canada and the U.S. were prepared. Altogether, the features appeared in 164 different publications with a combined readership of 35 million.

TOURISM DEVELOPMENT BRANCH

The Tourism Development Branch is responsible for the provision of sectoral expertise and a planning framework to enhance the tourism industry's development. In co-operation with the department's regional offices, this branch co-ordinates planning and programming around national and international development concerns to ensure balanced growth of the tourism industry across Canada.

A core component of the branch's strategy for maximizing net economic benefits of tourism development is the destination area approach. To this end, branch planners developed a comprehensive methodology known as "Process for Identification, Analysis and Selection of Tourism Destination Areas in Canada". A step-by-step process for identification and assessment of significant tourism factors, it is currently being applied in various regions of Canada.

More than \$14.5 million in financial assistance was provided in 1982-83 for construction of trade and convention centres in Vancouver, Edmonton, Toronto, Montreal and Charlottetown. The Sudbury Science Centre also received \$3.4 million toward construction.

In support of tourism development planning, work continued on the national base of resource, product and market data which will be linked to the product/market match system currently under development and scheduled for full implementation by the end of 1983. This system matches product and market information through a series of overlaying maps. The final map will display locations in Canada most suited to a given set of market specifications. The system will also enhance development planning by identifying those product and service factors which can be influenced to increase tourist visits.

The branch also co-ordinated the development of a national personnel strategy for the tourism/hospitality industry. During fiscal year 1982-83 the branch administered approximately \$2 million for tourism-related projects under the Special Employment Initiatives Program in five provinces.

Research and development work was largely completed on an educational/training project entitled "Tourism Is Your Business" aimed at upgrading the business and management aspects of the small and medium-sized accommodation sector, particularly those operators in smaller or more remote communities where traditional training resources are less accessible. The video package is available for broadcast over educational and community cable television stations and the supplementary print components available to facilitate at-home learning.

The branch also seeks to improve the environment for industry development by continuing to review and influence federal legislation which affects the tourism industry. The branch is also actively involved in identifying and cataloguing tourism investment opportunities in Canada in order to stimulate industry growth.

INDUSTRY PERSPECTIVE

International Travel

Overall, 12 727 842 visitors came to Canada in 1982, down 4 per cent from 1981. U.S. residents entering Canada for overnight or longer stays numbered 10 974 047, down 3.6 per cent from 1981. Visitors from other countries totalled 1 753 795 in 1982, down 6.3 per cent.

While visits to Canada by travellers from Japan, Australia, Brazil, Venezuela, Columbia, Austria, Finland and Norway increased in 1982, these gains were offset by decreases in the numbers of visitors from several of Canada's traditional overseas markets, including Britain, France, West Germany and the Netherlands.

Canadians returning from spending one night or more in other countries totalled 11 919 074, down 4 per cent from 1981.

Canada earned \$3.7 billion from international travel in 1982, slightly less than the \$3.8 billion earned in 1981. Canadians travelling abroad spent \$5.1 billion in 1982, up 2.7 per cent from the \$4.9 billion they spent in 1981.

Canada's international travel deficit increased by 14.9 per cent from \$1.1 billion in 1981 to \$1.3 billion in 1982.

Domestic Travel

It is estimated that Canadians made 70.1 million person-trips of one night or more within Canada in 1982, the lowest number of person-trips recorded in the four years for which there are comparable records. [A person-trip is defined as travel by an individual over a distance of 80 km (50 miles).]

Canadians spent an estimated \$12.4 billion on overnight travel in Canada in 1982, up 9.7 per cent over 1981 expenditures.

THE COMPTROLLER

The Comptroller's Office is responsible for the design and co-ordination of the department's management planning and control process, the provision of financial and information services and management support.

The functions and major activities of the branches reporting to the Comptroller are:

RESOURCE MANAGEMENT BRANCH

The branch provides financial management advice with respect to planning, programming and budgeting decisions; consolidates the departmental Multi-Year Operational Plan submission, Main Estimates and Supplementary Estimates; and controls budgets.

During the year, the branch provided consolidated REE/ITC resource utilization data and helped develop an integrated reporting mechanism on all departmental activities. The branch is a source of advice on the resource implications of projects and program proposals.

FINANCIAL OPERATIONS BRANCH

The branch is responsible for developing and implementing financial policy and systems accounting for and controlling financial resources, auditing assistance projects and providing financial advisory services.

During the year, the financial operations of the Departments of Regional Economic Expansion and Industry, Trade and Commerce were integrated.

ADMINISTRATIVE SERVICES BRANCH

The branch is responsible for security and safety, contracting and materiel administration, property administration, telecommunications, printing and duplicating, word processing, forms management, records management, micrographics, mail and messenger services, travel services, library services, and the management of administrative units.

A major task of the branch during the year was the physical integration of the Departments of Industry, Trade and Commerce and Regional Economic Expansion at headquarters as well as in regional and local offices. Considerable emphasis was placed on the development of new systems to effect the "automated office" concept.

COMPUTER SERVICES BRANCH

The branch develops and maintains computer-based systems design software and operating software. It is responsible for the physical management of corporate data, and the provision and operation of all physical computer facilities including hardware and data communication networks. The department spent \$7.3 million in 1982-83 to purchase data processing goods and services from the private sector.

Priority was given to bringing existing major development work on the incentive programs to an acceptable interim state pending clarification of the operational requirements of the new programs.

Other activities included the implementation of a transitional personnel information system to facilitate the organizational merger and an interim decentralized financial system for use by the new department during fiscal year 1983-84.

PROGRAM EVALUATION BRANCH

The branch provides information on the effectiveness of departmental programs and recommends appropriate changes. It developed a new approach to conduct evaluations in the new departmental structure and participated in the design of the department's new Industrial and Regional Development Program by identifying future evaluation needs. In addition, in conjunction with regional program evaluation personnel, a number of subsidiary agreements were evaluated.

MANAGEMENT PRACTICES BRANCH

The branch conducts activities to upgrade management skills; coordinates the Management Action Plan to improve management practices and controls; and responds to the requirements of the Office of the Comptroller General under its Improvement of Management Practices and Controls Program.

The Management Action Plan, administered by the branch, has provided a forum for the development and implementation of tasks aimed at establishing and maintaining sound management practices in the department. Particular emphasis has been placed on reorganizational and accountability issues related to the amalgamation of ITC and REE, the development of an integrated planning process, systems development and human resource strategy.

INFORMATION RESOURCE MANAGEMENT BRANCH

The branch is responsible for the application of resource management principles to all departmental information resources and performs a departmental policy and planning function in this area.

Since its creation in January 1983, the branch has developed a strategic framework for integrating management information systems in support of the new department's program structure and management process. This includes the creation of a departmental management information infrastructure and the development of strategies to provide direction and control of the management of information, data and information-related technologies, with particular emphasis on microcomputer technology.

ACCESS TO INFORMATION AND PRIVACY OFFICE

The office was created in response to the government enacting access to information and privacy laws.

The office's primary responsibilities include assisting the public with access requests, developing policies, and advising senior management on the operation of the legislation and the disposition of cases.

REGIONAL ACTIVITIES

In addition to the programs previously described, personnel of the merging departments continued to administer the subsidiary agreements of the Department of Regional Economic Expansion and the Regional Development Incentives Program.

These activities are described by province and territory.

NEWFOUNDLAND

As of March 31, 1983, 21 subsidiary agreements had been signed under the General Development Agreement (GDA). Following is a description of activities under subsidiary agreements and other programs during 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Forestry

Duration: 01/06/73 to 31/03/83

Costs shared by:

DREE	\$ 58 178 500
Provincial government	8 343 655
Total estimated cost	\$ 66 522 155

DREE expenditure to date	\$ 55 580 110
DREE expenditure 1982-83	Nil

This agreement was designed to improve the efficiency of the province's forest industry and to increase employment and income opportunities in that sector. An integrated system of resource management was devised to stimulate productivity and diversify forest industries.

In the initial years, the agreement jointly funded the expansion and development of the facilities of the provincial Department of Forest Resources and Lands, and paid the salaries of personnel. Subsequent agreements did not cover salaries.

Projects under the agreement included experimentation with new techniques for harvesting timber on steep slopes, construction of forest access roads, establishment of a tree nursery, and improvement and expansion of the province's water timber fleet.

A major \$11.5 million amendment was signed in 1979 in order to take advantage of opportunities for expanding and diversifying Newfoundland's forest industries through the undertaking of labour-intensive forestry activities which improved resource management. Projects completed under the amendment (Forestry Economic Stimulation Program) include: site rehabilitation, re-commercial thinning, roadside clearing, cone collection, cable logging and salvage harvesting. Both Abitibi-Price Inc. and Bowater Newfoundland limited undertook industry projects such as stand improvement and pre-commercial thinning. At peak season 420 people were employed on projects under the Forestry Economic Stimulation Program.

This agreement expired September 30, 1979, except for the job creation component which expired March 31, 1983. Responsibility for implementation of the agreement was transferred to the Canadian Forestry Service in September 1982.

Labrador

Duration: 03/12/76 to 31/03/84

Costs shared by:

DREE	\$ 18 258 300
Health & Welfare Canada	1 404 000
Provincial government	2 434 700
Total estimated cost	\$ 22 097 000

DREE expenditure to date	\$ 16 900 080
DREE expenditure 1982-83	\$ 318 068

The components of this interim agreement include: provisions for municipal infrastructure and economic development in the Lake Melville area; the construction of a bridge in North West River; the construction of an industrial park for Wabush-Labrador City; and the provision for coastal residents of higher quality water, improved domestic sanitation, and improved access to medical services.

A 32-ha industrial park has been constructed at Wabush to serve western Labrador and northeastern Quebec; a bridge has been built in North West River, linking the two sides of the community and linking the north side to Goose Bay and Churchill Falls; and street and neighbourhood improvement have been undertaken in Happy Valley-Goose Bay, along with the construction of a residence for the vocational school. A development corporation has been funded to spearhead economic development. Water, sewer, and waste disposal services have been provided in a number of coastal communities. Nursing clinics have been constructed to serve the basic health needs of residents in three isolated coastal communities. Caribou herd studies, biophysical studies, community plans, and transportation and port planning have all been undertaken.

Tourism Development

Duration: 01/01/78 to 31/03/84

Costs shared by:

DREE	\$ 11 938 140
Provincial government	1 326 460
Total estimated cost	\$ 13 264 600

DREE expenditure to date	\$ 9 857 582
DREE expenditure 1982-83	\$ 2 752 716

This comprehensive tourism development agreement is designed to improve the efficiency of tourism marketing and visitor information programs, to develop tourist attractions, and to encourage the expansion of visitor accommodations.

Projects include restoration of the Grenfell and Bradley historic houses; building tourism chalets in western and eastern Newfoundland; the restoration of the houses, churches and stores in the historic village of Trinity; upgrading and extending tourist campground accommodations; and a financial incentive program for hotel and motel operations.

Rural Development

Duration: 01/04/78 to 30/09/83

Costs shared by:

DREE	\$ 15 122 000
Provincial government	680 000
Total estimated cost	\$ 16 802 000

DREE expenditure to date	\$ 12 588 579
DREE expenditure 1982-83	\$ 2 793 764

This agreement continues earlier initiatives to revitalize and strengthen the rural sector of the province. Projects include assistance to incorporated regional development associations for administrative and community project purposes. Support is also provided to craft associations, craftspersons and small rural enterprises.

Assistance to the regional development associations includes funding for basic administrative purposes; training; and planning and implementation of locally designed community development projects, which have ranged from elementary forms of fish processing to a woolen mill.

Financial aid is provided to small rural enterprises that do not qualify for assistance under the regional development incentives program, such as boat building, wood working, fish processing and small manufacturing activities. Craft assistance is provided in the form of design assistance and for expansion of production and marketing.

Agriculture Development

Duration: 14/07/78 to 31/03/83

Costs shared by:

DREE	\$ 12 907 170
Agriculture Canada	1 800 000
Provincial government	1 634 130
Total estimated cost	\$ 16 341 300

DREE expenditure to date	\$ 7 749 370
DREE expenditure 1982-83	\$ 2 673 832

The objective of the agreement was to support the growth of the agriculture industry in Newfoundland through increased production, improvements in management and technical capabilities of farmers, improved marketing systems, effective land development and modern agricultural support services.

Under the capital assistance program for farm development, 200 applications were approved for a financial commitment of \$4.2 million. A marketing program designed to increase production and consumption of local produce resulted in the construction of a modern marketing building and the mounting of a promotion campaign to increase consumer awareness. Land-use planning and soil surveys have more precisely defined the agricultural land base, while provision of analytical and veterinary laboratory facilities will serve the ever-increasing demands of the farm industry. Further development of the blueberry industry took place through the construction of access roads and blueberry cloning trials.

Forty-two development opportunity projects valued at \$1.7 million are under way throughout the agricultural sector. Responsibility for this agreement was transferred to Agriculture Canada in September 1982.

Industrial Development

Duration: 11/06/79 to 31/03/84

Costs shared by:

DREE	\$ 23 985 000
Provincial government	2 665 000
Total estimated cost	\$ 26 650 000

DREE expenditure to date	\$ 19 111 731
DREE expenditure 1982-83	\$ 7 570 863

The first phase of this agreement supports industrial development in the province, initially in the Corner Brook and Stephenville areas of western Newfoundland, through the provision of the infrastructure necessary for the development of industrial and commercial enterprises.

The agreement provides funding for the development of a 30 ha industrial park in Corner Brook, the construction of a direct access road from the Trans-Canada Highway south of the city to the park and on to the downtown waterfront, and the construction of a direct access road from the Stephenville industrial area and the Port au Port Highway system to the Trans-Canada Highway.

During 1982-83, with the eastern 10 km of the Corner Brook access road already paved, rough grading on the final 4.5 km was carried out. Construction of the industrial park continued and was over 90 per cent completed by year end. External water and sewer mains are constructed. The water pumping and pressure control system is yet to be installed.

Paving of the last 15 km of the 23 km Stephenville access road was completed during the year and the road opened to traffic.

Forestry 1981-86

Duration: 09/01/81 to 31/03/86

Costs shared by:

DREE	\$ 46 883 700
Provincial government	5 209 300
Total estimated cost	<u>\$ 52 093 000</u>

DREE expenditure to date	\$ 7 719 693
DREE expenditure 1982-83	NIL

This agreement is designed to maintain and, where possible, increase the contribution from the forestry sector to the provincial and national economy; to lessen the future negative impact of projected reduction in the allowable annual cut on established industries in the main economic supply zone; and to promote increased use of forest resources within and outside the main economic supply zone.

This agreement was transferred to the Canadian Forestry Service on September 1, 1982.

Community Development for Coastal Labrador

Duration: 29/05/81 to 31/03/87

Costs shared by:

DREE	\$ 33 800 000
Provincial government	5 196 000
Total estimated cost	<u>\$ 38 996 000</u>

DREE expenditure to date	\$ 13 481 823
DREE expenditure 1982-83	\$ 7 720 671

The components of this agreement include: reconstruction and paving of the Straits Highway in Southern Labrador and inter-community roads in

Southeastern Labrador; provision for coastal residents of improved water and domestic sanitation facilities; construction of additional medical clinics, and funding for investigative studies toward development of small industry in the region.

A 50 km section of the Straits Highway has been reconstructed and paving contracts have been awarded for construction of access roads from Williams Harbour to George's Cove and from Mary's Harbour to Lodge Bay. The former is nearing completion.

Water and sewer projects are under way in L'Anse-au-Clair, Forteau, L'Anse-au-Loup and Cartwright. Design is commissioned for projects in Mary's Harbour, Red Bay and West St. Modeste.

Construction of the new medical clinic at St. Lewis is nearing completion, while the facility at Black Tickle is about 30 per cent complete. The buildings in Mary's Harbour and Cartwright are being renovated, and the Mary's Harbour project is nearing completion.

Studies and pilot projects are being carried out on tourism, agriculture, cadastral mapping, minerals, communications, training needs and trapper education.

Pulp and Paper Mill Modernization

Duration: 01/06/81 to 31/03/86

Costs shared by:

DREE	\$ 30 000 000
Provincial government	3 333 000
Total estimated cost	<u>\$ 33 333 000</u>

DREE expenditure to date	NIL
DREE expenditure 1982-83	

Under this agreement, Canada and the province will participate jointly in a program of incentives for the pulp and paper industry in Newfoundland. The objectives of the agreement are to improve the viability, efficiency and international competitiveness of the Newfoundland pulp and paper industry by accelerating and maximizing investment and encouraging policies within the private sector which are supportive of good forest management, pollution abatement, and industrial modernization.

The funds will be used for possible assistance to the Bowater Newfoundland Limited mill in Corner Brook and to the Abitibi-Price Inc. mill in Grand Falls.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during 1982-83 was as follows:

Net accepted offers	4
Number of jobs expected to be created	30
Eligible capital investment associated with offers	\$ 1 946 000
DREE commitment through these offers	\$ 449 000
Total payments 1982-83	\$ 4 385 649

NEWFOUNDLAND AND LABRADOR DEVELOPMENT CORPORATION

The corporation was established in 1972 to complement the regional development incentives program as a source of venture capital for manufacturing and resource development in the province. Loan funding is provided to the corporation by DREE and equity funding by the Government of Newfoundland. Operating expenses are shared equally. The agreement is due to expire March 31, 1984.

During 1982-83, DREE advanced \$0.5 million in loan funds to the corporation and spent \$268 650 as its share of the operating costs.

Canada Fisheries Development Program

Duration: 21/05/81 to 31/03/86	
Total estimated cost to DREE	\$ 13 500 000
DREE contribution to DFO to date	\$ 945 000
DREE contribution to DFO 1982-83	\$ 945 000

This is a direct federal program being delivered co-operatively with the Department of Fisheries and Oceans. The program is designed to improve the efficiency of landing, handling and processing of various fish species on the Labrador coast. Approved projects will be funded 100 per cent when the proponents are fishermen's associations or community councils, as these groups have no source of revenue capable of providing the capital investment necessary. Improvements to facilities owned by the province, fish processors and co-operatives will be cost shared with each owner/operator.

There are six program elements under which projects will be approved: ice-making and storage, fish holding and cold storage, community stages and unloading facilities, utility servicing, fish processing and handling and vessel servicing. To date, 101 proposals have been

received for projects under the program, of which 47 were approved.

In addition, mechanized landing systems have been installed in a number of communities along the coast; a bait-holding unit is under construction in Red Bay; improvements have been completed on a processing plant owned by the Town of Rigolet; and renovations have been carried out on a community stage at West St. Modeste.

Bale Verte Mines Inc.

Duration: 23/09/82 to 31/03/87

Total estimated cost to DREE:	\$ 13 000 000
DREE expenditure to date	\$ 8 497 392
DREE expenditure 1982-83	\$ 8 497 392

This agreement was signed under the Special Areas legislation to enable the federal government to assist the company, Bale Verte Mines Inc. (a wholly-owned subsidiary of Trans-Pacific Asbestos Inc.) take over and operate the former mining operation of Advocate Mines Limited. In addition, the provincial government is contributing \$3 000 000.

On September 9, 1981, Advocate Mines Limited, asbestos producer and former operator of the mine at Bale-Verte, announced its intention to close the mine permanently on December 31, 1981. A result would be the loss of approximately 800 jobs. This action occurred at a time when Rambler Mines Limited announced plans to cease its copper mining operation on the Bale-Verte Peninsula, eliminating an additional 200 jobs.

The agreement was designed to assist a new operator, Bale Verte Mines Inc., restart the mining operation and re-establish jobs for approximately 320 of the original work force.

The program of assistance is primarily loans and loan guarantees. The agreement enabled the company to improve its working capital position, thereby affording the acquisition of assets and enabling the firm to commence early start-up of the operation and inventory build-up.

The agreement has a positive impact on the economy of the Bale-Verte Peninsula and the province in general. The markets for asbestos have been soft. The arrangement has enabled the two governments to preserve a portion of the employment base related to asbestos mining. Through its marketing expertise and operational experience, the company has been able, without the benefits of greater

subsidies, to establish a commercially viable enterprise and a more efficient and effective mining and ore recovery operation.

PRINCE EDWARD ISLAND

On October 7, 1981, the federal government announced a three-year (April 1, 1981 to March 31, 1984) \$92 million package of economic development programs for Prince Edward Island. The package includes a \$53 million cost-sharing agreement with the province for the third and final phase of the 15-year Comprehensive Development Plan Agreement and the \$39 million Federal Development Strategy for Prince Edward Island that provides for co-ordinated implementation of federal programs designed specifically for the province.

The Federal Development Strategy, which involves the participation of six federal departments including DREE, will provide the framework for continued federal contribution to economic development on Prince Edward Island after termination of the Comprehensive Development Plan Agreement in 1984.

A federal management committee, chaired by MSERD and having representation from the departments of Regional Economic Expansion and Industry, Trade and Commerce; Agriculture; Transport; Fisheries and Oceans; and Energy, Mines and Resources, has been established by Treasury Board to ensure co-ordination of program planning.

DREE expenditures during 1982-83 under the Comprehensive Development Plan totalled \$13 597 599 and under the Federal Development Strategy for Prince Edward Island totalled \$3 600 324.

SELECTED DREE PROGRAMS UNDER THE FEDERAL DEVELOPMENT STRATEGY FOR PRINCE EDWARD ISLAND

From April 1, 1981 to March 31, 1984, DREE will allocate \$10.8 million to the implementation of economic development programs under the Federal Development Strategy for Prince Edward Island.

Small Business Assistance Program

The objectives of the program are to encourage the development of the small business sector on Prince Edward Island by providing financial assistance for capital projects which are not currently eligible for assistance under existing federal programs, and to generate employment and income

opportunities within the small business sector. During the year 25 projects were offered assistance totalling \$257 033.

Acadian Community Development Program

The objective of the program is to encourage francophone individuals and groups to initiate economic projects that contribute to the development and strengthening of the French language and Acadian culture on Prince Edward Island. During the year 33 projects were offered assistance totalling \$290 029.

Community Industrial Support Program

The objective of the program is to encourage Area Industrial Commissions in Prince Edward Island to promote, co-ordinate and implement economic development activities in the communities within their jurisdiction. During the year 17 projects were offered assistance totalling \$501 103.

Community Assistance Program

The objective of the program is to encourage municipalities not currently within the jurisdiction of an Area Industrial Commission to undertake economic development activities. During the year 7 projects were offered assistance totalling \$139 226.

Urban Development Program

Under this program \$3.1 million was committed to cover the entire cost of building the southern section of Harbour Drive in Summerside. Once completed, Harbour Drive will link the downtown shopping area and the waterfront into a geographic and commercial unit, speed traffic flow, increase parking space and substantially revitalize the town's central core.

SELECTED PROGRAMS UNDER THE COMPREHENSIVE DEVELOPMENT PLAN

From April 1, 1981 to March 31, 1984, DREE will contribute \$41 million to the implementation of programs under the Prince Edward Island Comprehensive Development Plan.

Agriculture

Agricultural programs in 1982-83 continued efforts to strengthen existing family farms and encourage new farmers to enter the industry. Since 1969, approximately 70 per cent of Prince Edward Island farmers have received capital assistance to expand, modernize, diversify or establish new operations.

During the year the Commodity Development Incentives Program provided assistance for more selective development in the agriculture industry.

Tourism

During the year assistance was provided towards the construction of a convention centre in Charlottetown and for a study into the feasibility of establishing a Culinary Institute on Prince Edward Island. The other cost-shared projects are travel sales development and tourism industry development. Their objectives are to promote marketing and development of the tourist sector. These latter activities will continue to be cost-shared and will be coordinated with the programs being delivered directly by the Canadian Government Office of Tourism.

Forestry

Programs to improve the quality and use of forests, initiated during Phase II of the Comprehensive Development Plan, were continued in 1982-83.

The forest resource incentive program has received strong support from the private sector, resulting in 550 approved forestry management plans.

During the year approximately 500 hectares of forest were upgraded through the planting of selected, improved seedlings.

Market and Product Development

This program helps to finance the Market Development Centre which assists producers, processors, and manufacturers in gaining access to the marketing services necessary to compete more successfully. In addition, it promotes new products, develops sales methods, and assists in improving sales of island products in new markets.

Transportation

Construction on five all-weather collector roads was carried out during the year. All projects were part of a highway construction program developed jointly by DREE and the provincial government.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during the fiscal year was as follows:

Net accepted offers	19
Number of jobs expected to be created	52
Eligible capital investment associated with offers	\$ 4 401 000
DREE commitment through these offers	\$ 1 114 000
Total payments 1981-82	\$ 1 604 735

NOVA SCOTIA

As of March 31, 1983, 16 subsidiary agreements had been signed under the GDA. Following is a brief description of activities under subsidiary agreements and other programs in 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Strait of Canso Area Development

Duration: 31/03/75 to 31/03/84

Costs shared by:

DREE	\$ 22 503 400
Provincial government	7 554 100
Total estimated cost	\$ 30 057 500

DREE expenditure to date	\$ 20 381 000
DREE expenditure 1982-83	\$ 887 000

The agreement is designed to equip the Strait of Canso region with support infrastructure to enhance the value of its deep water port and other industrial location attributes. Current development efforts are concentrated on supply base support for offshore gas activity, service and other spin-offs from this industry and heavy industry prospects. Funds are provided to maintain a promotion and development agency, the Strait of Canso Development Authority.

Industrial Development

Duration: 22/06/76 to 31/03/83

Costs shared by:

DREE	\$ 19 031 200
Provincial government	4 757 800
Total estimated cost	\$ 23 789 000

DREE expenditure to date	\$ 18 864 000
DREE expenditure 1982-83	\$ 245 000

This agreement was designed to support the development of new employment opportunities in the secondary and tertiary sectors of the Nova Scotia economy; to encourage the development, expansion and efficiency of indigenous enterprises; and to

increase the variety of employment opportunities available, with emphasis on higher-skill and higher-wage employment, particularly in certain intermediate-sized communities.

The agreement provided for industrial parks in the following growth potential areas: Amherst, Bridgewater, Debert, Kentville, Stellarton and Windsor. Construction was completed in all these parks during the year. Multi-purpose industrial hall facilities have been opened at Debert and Kentville.

Tourism

Duration: 01/04/77 to 31/03/83

Costs shared by:

DREE	\$ 11 000 000
Provincial government	2 750 000
Total estimated cost	<u>\$ 13 750 000</u>

DREE expenditure to date	\$ 10 736 000
DREE expenditure 1982-83	\$ 1 168 000

The objectives of the agreement were to create employment opportunities and to increase income from further development of the tourism industry. Two programs were included in the agreement. The first encompassed various province-wide projects aimed at promoting the industry within Nova Scotia, improving the efficiency of the industry and expanding it where possible and desirable, and extending the tourism season. The second program related directly to the development of designated destination areas. Projects included the construction or expansion of major attractions; provision of suitable attractions for day trips; and coordination of planning, promotion and implementation efforts within the destination areas.

Halifax Panamax Dry Dock

Duration: 22/01/80 to 31/03/85

Costs shared by:

DREE	\$ 43 900 000
Provincial government	13 700 000
Total estimated cost	<u>\$ 57 600 000</u>

DREE expenditure to date	\$ 43 241 000
DREE expenditure 1982-83	\$ 7 942 000

This agreement calls for joint participation in a program to provide key marine infrastructure to the port of Halifax, particularly a Panamax-type floating dry dock, dock mooring and servicing facilities, and ancillary equipment for ship repair and metal fabrication. Construction of the floating dry dock and related infrastructure is

nearing completion. Commissioning of the dry dock is expected in late 1983.

Assistance to Michelin Tires (Canada) Ltd.

Duration: 07/06/80 to 31/12/90

Costs shared by:

DREE	\$ 42 000 000
Provincial government	14 000 000
Total estimated cost	<u>\$ 56 000 000</u>

DREE expenditure to date Nil

DREE expenditure 1982-83

This agreement provides for the company's operations at Granton and Bridgewater. It also enables the company to implement significant productivity improvements, including CAD/CAM facilities at its two original plants, and to establish a new tire manufacturing plant at Waterville.

Modernization of Facilities at the Sydney Steel Corporation

Duration: 01/04/81 to 31/03/84

Costs shared by:

DREE	\$ 77 000 000
Provincial government	19 250 000
Total estimated cost	<u>\$ 96 250 000</u>

DREE expenditure to date	\$ 13 844 000
DREE expenditure 1982-83	\$ 12 008 000

The objectives of the agreement are to assist the province to maintain employment levels consistent with efficient plant operations and to improve the financial position at the Sydney Steel Corporation through the provision of a capital works program which will ensure a physical plant capable of working efficiently.

Pulp and Paper Modernization

Duration: 23/05/81 to 31/03/84

Costs shared by:

DREE	\$ 17 000 000
Provincial government	4 250 000
Total estimated cost	<u>\$ 21 250 000</u>

DREE expenditure to date	\$ 2 458 000
DREE expenditure 1982-83	\$ 2 458 000

Capital investment of approximately \$121 million in mill modernization, pollution abatement, and energy cost-reduction projects, is expected to be encouraged by incentives provided under this agreement. The agreement is intended to assist Nova Scotia mills in maintaining their competitive

position and enable the mills to meet current pollution-control requirements. Incentives have been approved for three companies and implementation is on schedule.

Ocean Industry Development

Duration: 24/07/81 to 24/07/86

Costs shared by:

DREE	\$ 22 950 000
Provincial government	12 050 000
Total estimated cost	\$ 35 000 000

DREE expenditure to date	\$ 899 000
DREE expenditure 1982-83	\$ 816 000

This agreement, the first major initiative in Canada relating to ocean industry, consists of two groups of programs funded individually by the federal and provincial governments and carried out jointly under the umbrella of the GDA. The objectives of the agreement are to stimulate the growth of a complex of medium-to-high-technology ocean manufacturing and service industries and to provide support for applied research and technology transfer to enable Nova Scotia to become a true centre of excellence in the ocean industry sector.

The federal program consists of capital and marketing assistance grants, assistance for ocean industry trade associations, an incubator mall for fledgling ocean industries, and an Ocean Industry Development Office to undertake promotion, development and coordination of federal programs. The provincial program provides grant assistance for municipal taxes, development of an ocean industry park, and an innovation centre to provide business management and advice to ocean industries.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during the fiscal year was as follows:

Net accepted offers	48
Number of jobs expected to be created	715
Eligible capital investment associated with offers	\$ 18 990 000
DREE commitment through these offers	\$ 6 876 000
Total payments 1982-83	\$ 9 596 000

NEW BRUNSWICK

As of March 31, 1983, 21 subsidiary agreements had been signed under the GDA. Following is a brief description of activities under subsidiary agreements and other programs during 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Saint John and Moncton Arterial Highways

Duration: 17/02/75 to 31/03/83

Costs shared by:

DREE	\$ 35 840 000
Provincial government	15 360 000
Total estimated cost	\$ 51 200 000

DREE expenditure to date	\$ 33 821 111
DREE expenditure 1982-83	\$ 516 800

The elements of this agreement include the completion of the Saint John Throughway, the Shediac to Moncton Highway, and construction of Wheeler Boulevard in Moncton.

Responsibility for this subsidiary agreement was transferred to Transport Canada on September 1, 1982.

Northeast New Brunswick

Duration: 23/06/77 to 31/03/84

Costs shared by:

DREE	\$ 67 175 000
Provincial government	28 325 000
Total estimated cost	\$ 95 500 000

DREE expenditure to date	\$ 45 887 329
DREE expenditure 1982-83	\$ 7 107 273

During this fiscal year, a contribution of \$1.6 million was made for the purchase of CAD/CAM equipment at the Bathurst Community College. This equipment will link the college to the Manufacturing Technology Centres established across the province and enable the business community to access this new technology.

An amount of \$1.4 million was allocated to tourism projects in the Restigouche area. These projects, consisting of a summer slide and campground upgrading at the Sugarloaf and Eel River parks, will be open to the public during the summer of 1984.

Two marine service centres in Bas-Caraquet and Shippegan also received funding of \$4.9 million. Once these projects are completed in the spring of 1984, fishermen will be able to haul out the vessels much more rapidly for repair and storage.

Development of Agricultural Resources

Duration: 01/04/78 to 31/03/83

Costs shared by:

DREE	\$ 27 698 000
Provincial government	6 924 500
Total estimated cost	\$ 34 622 500

DREE expenditure to date	\$ 19 586 833
DREE expenditure 1982-83	\$ 113 250

This was the second subsidiary agreement on agriculture signed with New Brunswick. The objective of the agreement was to maximize the contribution of agricultural and related sectors to provincial output, earned income and employment. Separate commodity strategies were developed and targets set for potatoes, fruits and vegetables, and livestock and livestock feeds. Specific goals were to increase volume and efficiency, expand processing and improve marketing.

Responsibility for this subsidiary agreement was transferred to Agriculture Canada on September 1, 1982.

Developing Regions

Duration: 17/05/79 to 31/03/83

Costs shared by:

DREE	\$ 20 401 500
Provincial government	5 872 500
Total estimated cost	\$ 26 274 000

DREE expenditure to date	\$ 9 979 420
DREE expenditure 1982-83	\$ 3 712 338

This agreement was designed to accelerate the economic and socio-economic development of certain areas in the province not covered by other regional agreements. Special emphasis was given to urban centres with growth potential. The programs, complementary to those under existing sectoral agreements, were aimed at the creation and maintenance of employment, income and economic activity.

In 1982-83, a major \$1.8 million tourism attraction, the Grand Falls Gorge development, received approximately \$582 000 towards the construction of two visitor centers. Under the municipal development program, a further

\$2.38 million was contributed toward municipal infrastructure projects in the Northwest and Miramichi regions of the province.

Forestry Development

Duration: 01/04/80 to 31/03/84

Costs shared by:

DREE	\$ 30 000 000
Provincial government	7 500 000
Total estimated cost	\$ 37 500 000

DREE expenditure to date	\$ 13 378 386
DREE expenditure 1982-83	\$ 1 366 224

The primary objective of this agreement is intensive silvicultural treatment of forest lands to sustain a long-term wood supply. The main emphasis is on softwood species.

Responsibility for this subsidiary agreement was transferred to the Canadian Forestry Service of Environment Canada on September 1, 1982.

Pulp and Paper

Duration: 27/08/80 to 31/03/84

Costs shared by:

DREE	\$ 33 800 000
Provincial government	8 450 000
Total estimated cost	\$ 42 250 000

DREE expenditure to date	\$ 23 740 966
DREE expenditure 1982-83	\$ 6 288 122

Developed through a federal-provincial planning exercise in which DREE and the Department of Industry, Trade and Commerce were the federal participants, this agreement recognizes the need for extensive modernization and cost-reduction programs in New Brunswick's pulp and paper industry, particularly in the older mills situated in the northern part of the province.

Seven of the province's mills have applied for incentive assistance under the agreement. Total capital investment by these mills will exceed \$500 million if the full \$42.25 million in assistance is taken up. To date, four mills have signed agreements with the federal and provincial governments.

The Boise Cascade Canada Ltd. pulp mill at Newcastle will receive a \$4 million incentive toward modernization. Boise Cascade will invest \$41 million for capital improvements in the areas of process modernization, pollution abatement and energy conservation.

NBIP Limited will receive \$12.5 million toward modernization of its newsprint mill at Dalhousie. Total cost of the company's modernization project is \$160.4 million.

St. Anne Nackawic Pulp and Paper Ltd. will receive a \$5 million incentive toward its pulp mill modernization. Total cost of the company's modernization project is \$62.2 million.

Fraser Incorporated of Edmundston will receive a \$17 million incentive in support of a \$169 million modernization of its Atholville mill. The three-pronged modernization program encompasses updating of equipment, pollution control and measures to improve efficiency of energy use.

Saint John Market Square Development

Duration: 14/10/80 to 31/03/83

Costs shared by:

DREE	\$ 8 085 800
Provincial government	2 021 500
Total estimated cost	\$ 10 107 300

DREE expenditure to date	\$ 2 887 748
DREE expenditure 1982-83	\$ 800 910

This agreement was designed to assist in the redevelopment of the downtown core area of the city of Saint John. The agreement provided contributions toward the construction of the trade centre and hotel components of a central building complex. During 1982-83, the trade centre was completed.

Responsibility for this subsidiary agreement was transferred to Public Works Canada on September 1, 1982.

Modernization of the Consolidated - Bathurst Inc. Facility at Bathurst, New Brunswick

Duration: 30/03/82 to 31/03/89

Costs shared by:

DREE	\$ 19 600 000
Consolidated-Bathurst	175 000 000
Provincial government	4 900 000
Total estimated cost	\$199 500 000

DREE expenditure to date	\$ 9 894 055
DREE expenditure 1982-83	\$ 8 774 055

The purpose of this agreement is to enable the federal and provincial governments and the company to implement an investment program and thereby maintain employment opportunities, and to encourage appropriate industrial and commercial development in the area.

The agreement is to be the catalyst for a modernization investment of \$175 million by Consolidated-Bathurst Inc. Under the modernization plan, the kraft operation at the Bathurst mill will be terminated. In its place, the company will construct a 400-tonne-per-day thermo-mechanical pulp plant, at a cost of \$98 million. The plant will come on stream in 1983.

During the period from 1981 to 1987, \$7 million will be spent upgrading the corrugating medium plant. An additional \$60 million will be spent to buy a new corrugating medium machine that will start production in 1988.

The entire plant will be brought up to federal-provincial environmental standards at an estimated cost of \$10 million.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during 1982-83 was as follows:

Net accepted offers	18
Number of jobs expected to be created	536
Eligible capital investment associated with offers	\$ 30 183 000
DREE commitment through these offers	\$ 7 996 000
Total payments 1982-83	\$ 10 035 234

Q U E B E C

DREE spent \$127.8 million in Quebec in 1982-83. Of this, \$30.2 million was spent on Canada-Quebec subsidiary agreements, and over \$87 million on incentives and contributions to manufacturing firms.

As of March 31, 1983, 10 subsidiary agreements were in effect under the GDA. Following is a brief description of the activities carried out under the subsidiary agreements administered by the department and other programs during 1982-83.

The Magdalen Islands economic development program announced in 1980-81, continued in 1982-83. Among the projects undertaken was an incentives program better adapted to the specific needs of the region's small and medium-sized businesses.

Under the various incentives programs for manufacturing firms, including the Magdalen

Islands enterprise assistance program, 227 Quebec manufacturing firms received offers of financial assistance; this should give rise to investments totalling \$150.6 million and lead to the creation of 2 176 jobs. DREE assistance to all these firms represented commitments totalling \$29.1 million in 1982-83.

On September 13, 1982, the department announced an assistance program for nautical infrastructure within the framework of the Quebec 1534-1984 celebrations. This program is designed to provide financial assistance for the development and expansion of ports of refuge along the St. Lawrence. Eleven priority sites have been identified. The total cost of the program will be \$9 million although no expenditures were made in 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Industrial Infrastructure

Duration: 26/03/75 to 31/03/84

Costs shared by:

DREE	\$ 82 602 000
Provincial government	55 068 000
Total estimated cost	<u>\$137 670 000</u>

DREE expenditure to date	\$ 54 614 000
DREE expenditure 1982-83	\$ 5 903 000

This agreement consists of a financial assistance program to enable municipalities to set up or improve their industrial infrastructure. The program has facilitated the creation and expansion of industrial parks, as well as the establishment of well equipped industrial fishery parks in the Gaspé and on the North Shore. Support is also available for municipalities that do not have the infrastructure needed for an industrial project.

In 1982-83, the implementation of the various projects approved under the agreement went ahead as planned, with the exception of activities in the fishery sector, where revamped provincial policies and programs made it necessary to postpone the implementation of certain major projects for another year.

DREE expenditures in 1982-83 totalled \$2.6 million for industrial park development, \$11 800 for fishery parks and \$3.3 million for special projects.

Tourism Development

Duration: 06/04/78 to 31/03/84

Costs shared by:

Government of Canada	\$ 69 600 000
Provincial government	66 400 000
Total estimated cost	<u>\$136 000 000</u>

DREE expenditure to date	\$ 40 925 000
DREE expenditure 1982-83	\$ 9 029 000

The agreement's overall objectives are to increase and diversify tourist attractions in order to increase the number of out-of-province visitors and encourage Quebecers to make greater use of their own province's tourist facilities. Specific programs include tourist promotion and the creation of tourist parks, the restoration of historic sites and buildings, the modernization of museums, the development of tourist stopovers, and the creation or improvement of open-air centres and holiday camps.

Through this agreement \$24 million was contributed to the funding of the Palais des Congrès in Montreal.

Public Infrastructure

Duration: 16/05/78 to 30/09/82

Costs shared by:

DREE	\$ 23 032 500
Employment and Immigration	228 500
Provincial government	11 615 000
Total estimated cost	<u>\$ 34 876 000</u>

DREE expenditure to date	\$ 20 207 000
DREE expenditure 1982-83	\$ 98 000

The purpose of this agreement is to contribute to municipal infrastructure projects that will create short-term employment and stimulate economic growth. The 22 municipalities targetted by the agreement are located in areas of high unemployment. Projects include the construction or improvement of water and sewage systems; construction of filtration plants; the provision of services for industrial zones; and the construction of roads, trailer parks and recreational facilities. The only project initiated in 1982-83 was the one in Parent; all the others had been completed.

Modernization of the Pulp and Paper Industry

Duration: 15/05/79 to 31/03/84

Costs shared by:

DREE	\$135 000 000
Provincial government	105 000 000
Total estimated cost	<u>\$240 000 000</u>

DREE expenditure to date	\$ 38 260 000
DREE expenditure 1982-83	\$ 13 384 000

The pulp and paper industry is the most important component of Quebec's forest industry. Over the past decade, however, economic factors have weakened the industry's competitive position on the international market.

Through this agreement, the two governments hope to promote the modernization of mills in order to make them more competitive. In order to encourage companies to increase their investments, financial assistance is provided in the form of direct incentives of up to 25 per cent of eligible assets. Incentives are granted primarily for improvements designed to reduce production costs and for the installation of equipment that will protect the environment and conserve energy.

In 1982-83, DREE committed approximately \$122 million in incentives to 21 Quebec businesses, including Gaspésia Ltd. in Gaspé, Domtar in Roberval, Donohue in Charlevoix, Reed Ltd. in Limoilou, Glassine Canada Inc. in Quebec City, Papiers Perkins Ltd. in La Prairie, James MacLaren Ltd. in Gatineau, Papier Q.N.S. Ltd. in Manicouagan and several plants belonging to Abitibi-Price Ltd., C.I.P. Ltd., Papiers Scott Ltd., Rolland Inc. and Kruger Inc.

Establishment of a Newsprint Mill in Amos

Duration: 24/07/80 to 31/03/83

Costs shared by:

DREE	\$ 25 500 000
Provincial government	17 000 000
Total estimated cost	<u>\$ 42 500 000</u>

DREE expenditure to date	\$ 25 500 000
DREE expenditure 1982-83	\$ 423 000

Under this agreement, the two governments have contributed to the establishment of the Donohue-Normick newsprint mill in Amos, and to the implementation, by the municipal corporations of Amos and Amos-Est, of the residential infrastructure required to accommodate the larger population resulting from the establishment of the plant.

The construction of the mill, which has an annual capacity of 160 000 metric tonnes, began in the fall of 1980 and was completed in the spring of 1982. The mill went into operation in March 1982, according to schedule, only 20 months after construction began. Moreover, it should be pointed out that, despite hard economic times and high interest rates, the project was completed within the estimated \$190 million budget. The mill, which uses pulp made entirely by a thermo-mechanical process, has created 700 direct and indirect jobs.

In Amos, all the residential infrastructure activities, except the paving of roads, have been completed, making it possible to service nearly 200 homes.

Société Inter-Port de Québec

Duration: 03/07/81 to 31/03/84

Costs shared by:

DREE	\$ 5 550 000
Provincial government	3 700 000
Total estimated cost	<u>\$ 9 250 000</u>

DREE expenditure to date	\$ 1 502 000
DREE expenditure 1982-83	\$ 1 187 000

The Société Inter-Port (SIP) contributes to the industrial development and promotion of the Quebec City area by focusing on projects likely to derive benefit from the port infrastructure. The Quebec government controls 60 per cent of the SIP, while the federal government controls the remaining 40 per cent. However, under the agreement, the federal government will contribute 60 per cent of investments, while the province will contribute 40 per cent.

The company's main objectives are to strengthen and diversify the economic structure of the metropolitan Quebec City area and to improve opportunities for employment. It supports the private sector and encourages investment that will have a major impact on the region's economy.

In 1982-83, the SIP stepped up its efforts to acquire land at Pointe-de-la-Martinelière. Thirty-four of the expropriation projects were settled; this represents 65 per cent of the 52 properties to be acquired.

During 1982-83, the SIP also contributed to the establishment of the Eastern Canada Timber Exporting Consortium. This was a first success arising from extensive lobbying of the regional business community in an effort to encourage them to group and create new consortia for common

purchasing, marketing and shipping services for industries in certain target sectors.

In addition, in keeping with its responsibility of ensuring greater cooperation between the various economic agents, the SIP was a prime mover in the creation of a coordinating committee grouping ten of the region's economic development organizations.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Regional Development Incentives Act

Activity under the Regional Development Incentives Act during 1982-83 was as follows:

Net accepted offers	137
Number of jobs expected to be created	875
Eligible capital investment associated with offers	\$ 71 483 000
DREE commitment through these offers	\$ 16 171 000

Montreal Special Area

The aim of this program is to accelerate the development of Quebec's industrial structure by strengthening the role of the Montreal area as the centre of manufacturing development in the province.

In 1982-83, activity under this program was as follows:

Net accepted offers	82
Number of jobs expected to be created	1 277
Eligible capital investment associated with offers	\$ 68 257 000
DREE commitment through these offers	\$ 12 535 000

During the 1982-83 fiscal year, DREE expenditures in Quebec through regional development incentives programs totalled \$86.6 million; \$45.5 million of this was spent through the Montreal Special Area program.

MAGDALEN ISLANDS ECONOMIC DEVELOPMENT PROGRAM

Compared with the other regions of Quebec, the Magdalen Islands still do not enjoy the level of economic development needed to help ease the chronic unemployment plaguing the region. The Islands' geographic location is one of the reasons for this sluggish economic growth. DREE is well aware of this situation and, with the participation of other federal departments, has

implemented a program aimed primarily at improving the living conditions of the local population and creating and maintaining permanent jobs in order to lower unemployment and reduce the number of people leaving the islands.

The initial program represented a commitment of \$13.7 million. During 1982-83, this commitment was increased by \$5.6 million. There are seven program elements, three of which are managed by Fisheries and Oceans, Transport Canada and Agriculture Canada. The other four elements are managed by DREE and make it possible to provide financial assistance to manufacturing firms, tourism concerns, and organizations wishing to carry out economic development projects or economic studies.

Activity under the industrial incentives program during 1982-83 was as follows:

Net accepted offers	10
Number of jobs expected to be created	25
Eligible capital investment associated with offers	\$ 916 000
DREE commitment through these offers	\$ 458 000
Total payments 1982-83	\$ 511 000

ONTARIO

By March 31, 1983, 11 subsidiary agreements had been signed with Ontario under the GDA. Seven agreements are currently active; six under DREE's management and one under the management of the Canadian Forestry Service (CFS) of Environment Canada. The forest management agreement was transferred to CFS as at September 30, 1982. No DREE expenditures occurred under this agreement for the 1982-83 fiscal year.

During the 1982-83 fiscal year, DREE expenditures in the Ontario Region totalled \$29 million. Included in this amount are program expenditures of \$19.2 million for subsidiary agreement activity and \$6.3 million for industrial incentives.

More than 270 new jobs and capital investments of almost \$12 million are anticipated as a result of 1982-83 activity under the regional development incentives program. During the year, 28 incentives offers were accepted. Assistance under the program is available to firms initiating manufacturing or processing projects and to firms

expanding or modernizing existing operations in designated portions of Ontario.

A brief description of DREE activity under active subsidiary agreements and under the regional development incentives program follows.

SUBSIDIARY AGREEMENTS UNDER THE GOA

Northeastern Ontario

Duration: 25/03/76 to 31/03/83

Costs shared by:	
DREE	\$ 13 799 000
Canada Mortgage and Housing Corporation	1 497 000
Provincial government	15 295 000
Total estimated cost	\$ 30 591 000

DREE expenditure to date	\$ 11 634 000
DREE expenditure 1982-83	\$ 1 362 000

Under this agreement, steps are being taken to strengthen the urban system of northeastern Ontario by alleviating constraints to development in selected key urban areas and by concentrating new economic activity in these areas. To date, area programs under this agreement have been developed for Parry Sound, Timmins, Sudbury, North Bay and Valley East.

During the 1982-83 year, final sewage and water hook-ups to the existing municipal system were completed in Valley East. Similarly, final sewer pump modifications and hook-up to the existing municipal system were completed under the sewers sub-program of the Sudbury area infrastructure program.

Under the North Bay area program, final water and sewer testing and the remaining underground work along Lakeshore Drive were completed in 1982-83, along with the pumping station, water standpipe, paving, and storm sewer works. The road access and storm drainage projects are currently under way.

Development programs in the Parry Sound and Timmins areas were completed in previous fiscal years.

Single-Industry Resource Communities

Duration: 18/10/76 to 31/03/84

Costs shared by:	
DREE	\$ 9 383 630
Indian Affairs and Northern Development	314 908
Ministry of Transport	150 000
Canada Mortgage and Housing Corporation	366 462
Provincial government	9 585 000
Total estimated cost	\$ 19 800 000

DREE expenditure to date	\$ 8 425 000
DREE expenditure 1982-83	\$ 281 000

This agreement is designed to diversify and stabilize the economies of single-industry resource communities in northern Ontario and to initiate programs aimed at easing the social and economic problems characteristic of single-industry towns.

Projects under this agreement are rapidly nearing completion. In March 1983, the agreement was amended to include the extension of water and sewer services from the town of Longlac to the Indian Reserve No. 58 community. Funding was provided from existing agreement contingency funds.

The agreement was also extended to terminate on March 31, 1984.

Community and Rural Resource Development

Duration: 07/12/77 to 31/03/85

Costs shared by:	
DREE	\$ 12 728 000
Provincial government	15 828 000
Total estimated cost	\$ 28 556 000

DREE expenditure to date	\$ 4 397 000
DREE expenditure 1982-83	\$ 656 000

The initial phase of the agreement, the Upper Ottawa Valley program, is designed to increase employment opportunities and incomes in the resource and manufacturing industries of Renfrew County. Program elements include forest and mineral resource assessments, industrial land development studies, and assistance to establish a county-wide economic development organization. Subsequent amendments provide for a program for new forests in eastern Ontario and a geoscientific surveys program in Kirkland Lake.

Under the Upper Ottawa Valley program, the county-wide economic development association has involved itself in numerous local economic initiatives. Of particular local interest was the commissioning of a manufacturing opportunities study which is intended to assist the area in developing a stronger economic base for the future. The findings of the Industrial land development studies project led to federal-provincial discussions concerning the need for an industrial park in Pembroke. An amendment to include a Pembroke area infrastructure program under this agreement was signed in April 1982, in which a federal contribution of \$8 million was allocated.

Work is well under way on five major projects under the program for new forests in eastern Ontario. These include hybrid poplar development, hardwood forest renewal, and forest and agricultural resource inventories.

Under the Kirkland Lake program, the airborne geophysical survey and the resulting data series maps continue to generate substantial mineral exploration activity in the Swastika, Kirkland Lake, Virginiatown and Larder Lake areas.

Pulp and Paper Industry Facilities Improvement

Duration: 15/05/79 to 31/03/84

Costs shared by:

DREE	\$ 60 000 000
Provincial government	120 000 000
Total estimated cost	<u>\$180 000 000</u>

DREE expenditure to date	\$ 51 609 000
DREE expenditure 1982-83	\$ 9 891 000

The purpose of this agreement is to stimulate private sector investment in the province's pulp and paper industry by the provision of incentives for mill modernization, energy conservation and pollution-abatement measures. The agreement is designed to encourage the industry to make the investments necessary to meet environmental requirements and to improve its competitive position in international markets.

Nine major pulp and paper companies have signed agreements to receive assistance under the program.

By the end of the year under review, expenditures by the companies had exceeded \$1.2 billion.

The program is progressing well and is meeting its objectives. It is anticipated that DREE's maximum contribution of \$60 million will be instrumental in spurring corporate investment of some \$2 billion during the lifespan of the agreement.

Eastern Ontario

Duration: 20/12/79 to 31/03/84

Costs shared by:

DREE	\$ 25 175 000
Provincial government	25 175 000
Total estimated cost	<u>\$ 50 350 000</u>

DREE expenditure to date	\$ 17 436 000
DREE expenditure 1982-83	\$ 5 018 000

The agreement is designed to help stabilize, diversify and expand the economic base of rural eastern Ontario by developing and ensuring the long-term viability of the natural resource base and by stimulating private investment in the region. Assistance has been allocated for agriculture, forestry, minerals, tourism and small business incentives.

Approximately \$3.2 million of federal-provincial funds in forgivable loans was offered to 51 enterprises during the 1982-83 fiscal year. As a result of these incentives, \$11.7 million of private sector investment was levered, creating potential for establishing an estimated 667 full-time jobs.

Forest-renewable operations continued to provide part-time employment for local residents during the winter months. Gradiometer survey technology, transferred from government to the private sector, stimulated mineral exploration through air surveys of mineral potential in eastern Ontario.

In addition, the construction of 29 municipal drains was approved under this agreement during 1982-83.

Northern Rural Development

Duration: 02/03/81 to 31/03/84

Costs shared by:

DREE	\$ 9 250 000
Indian Affairs and Northern Development	750 000
Provincial government	8 500 000
Total estimated cost	<u>\$ 18 500 000</u>

DREE expenditure to date	\$ 2 114 000
DREE expenditure 1982-83	\$ 1 984 000

The intent of this agreement is to expand and diversify the economic base of rural northern Ontario by stimulating small-scale, local entrepreneurial activity - an essential element in the long-term development of the north. Financial assistance is available for a range of economic activities, including agriculture, natural resources, tourism and small business development.

To the end of March 1983, a total of 357 projects were approved for assistance, representing a total federal commitment of over \$6.8 million.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

All of northern Ontario, including the districts of Parry Sound and Nipissing, and the Renfrew-Pembroke area of eastern Ontario are eligible for assistance under the Regional Development Incentives Act.

Activity under the regional development incentives program during 1982-83 was as follows:

Net accepted offers	28
Number of jobs expected to be created	278
Eligible capital investment associated with offers	\$ 11 892 000
DREE commitment through these offers	\$ 2 761 000
Total payments 1982-83	\$ 6 320 000

MANITOBA

As of March 31, 1983, nine subsidiary agreements had been signed under the GDA. Following is a brief description of activities under subsidiary agreements and other programs during 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Northern Development Agreement

Duration: 29/11/82 to 31/03/87

Costs shared by:

DREE	\$ 62 800 000
Employment and Immigration	40 000 000
Indian Affairs and Northern Development	22 200 000
Provincial government	61 200 000
Total estimated cost	\$186 200 000

DREE expenditure to date	\$ 1 597 000
DREE expenditure 1982-83	\$ 1 597 000

The objectives of this agreement are to develop locally-based income and employment opportunities in northern and remote communities and to increase the participation of the northern labour force, particularly in major resource sectors, by removing constraints to human and economic development. The programs within the agreement focus on community economic development, human

development and community improvement. The agreement is designed to put local residents in a position of readiness to take advantage of future economic developments in northern Manitoba. Co-ordination among parties to the agreement is to facilitate measures of preparation for employment, the identification of emerging opportunities and the placement of trained workers in a range of resource developments and technical, professional and service jobs.

Industrial Development

Duration: 01/04/78 to 31/03/83

Costs shared by:

DREE	\$ 26 400 000
Provincial government	17 600 000
Total estimated cost	\$ 44 000 000

DREE expenditure to date	\$ 11 644 000
DREE expenditure 1982-83	\$ 4 622 000

The objectives of this agreement are to accelerate the industrial development process in the province through knowledge and promotion of industrial opportunities and through technology transfers, to support small business and to offset industrial infrastructure costs associated with plant location.

Priority industries which are significant to the province's economy are food and beverages, health care products, light machinery, transportation equipment, aerospace and electronics.

Value-Added Crops Production

Duration: 01/04/79 to 31/03/84

Costs shared by:

DREE	\$ 11 100 000
Provincial government	7 400 000
Total estimated cost	\$ 18 500 000

DREE expenditure to date	\$ 3 780 000
DREE expenditure 1982-83	\$ 820 000

The purpose of this agreement is to accelerate the expansion of value-added crops production and conversion of crops through livestock into red meats. This is to be achieved by stimulating the production of crops grown mainly for industrial processing, by encouraging improvement in the efficiency of forage production and livestock feeding, and by providing measures to remove constraints to production of value-added crops.

DREE expenditure for 1982-83 terminated on October 13, 1982 with the transfer of the agreement to Agriculture Canada.

Tourism Development

Duration: 01/04/79 to 31/03/84

Costs shared by:

DREE	\$ 12 000 000
Provincial government	8 000 000
Total estimated cost	<u>\$ 20 000 000</u>

DREE expenditure to date	\$ 1 814 825
DREE expenditure 1982-83	\$ 479 717

The overall objective of this agreement is to strengthen the destination areas in the province and to improve the productivity of the tourism industry through joint industry and government action.

Water Development for Regional Economic Expansion and Drought Proofing

Duration: 30/05/80 to 31/03/84

Costs shared by:

DREE (PFRA)	\$ 5 350 000
Provincial government	3 600 000
Total estimated cost	<u>\$ 8 950 000</u>

DREE expenditure to date	\$ 3 450 000
DREE expenditure 1982-83	\$ 1 688 000

The Manitoba Affairs Office of PFRA is responsible for managing the federal interest in this interim agreement which includes studies to assess the effects of drought on present and future development and specific water supply projects. Drought sensitivity studies are being conducted by PFRA and by the Department of Agricultural Economics of the University of Manitoba under a contractual arrangement.

Studies of groundwater availability were continued. Both private contractors and PFRA staff and drilling equipment were involved in drilling and test-pumping.

The Assiniboine South-Hespeler area studies continued during the year. Two major projects are being examined: a diversion from the Assiniboine River to the La Salle River Basin to provide water for agricultural use, and provision of water by a major storage and diversion system from the Assiniboine River to the remainder of the Assiniboine South-Hespeler area. Such diversions, it is believed, would provide significant irrigation opportunities within the area.

DREE expenditures for 1982-83 terminated on March 4, 1982 with the transfer of the agreement to Agriculture Canada.

Winnipeg Core Area

Duration: 04/09/81 to 31/03/86

Costs shared by:

DREE	\$ 32 000 000
City of Winnipeg	32 000 000
Provincial government	32 000 000
Total estimated cost	<u>\$ 96 000 000</u>

DREE expenditure to date	\$ 5 002 000
DREE expenditure 1982-83	\$ 3 583 000

The Canada-Manitoba-Winnipeg Tripartite Agreement responds to the social, economic and neighbourhood conditions in the city's core. This area covers the downtown and surrounding older neighbourhoods of Winnipeg and accounts for one-fifth of the city's population. Historically, the area has played a major role in the development of Manitoba and the West. However, during the past 30 years of rapid suburban growth, its major strengths and opportunities have been overshadowed by social, economic and physical deterioration.

The objectives of the agreement are to provide increased employment opportunities; to encourage appropriate industrial, commercial and residential development and to revitalize the physical and social environment of the core area; and to facilitate the effective social and economic participation of core area residents in development opportunities.

These objectives will be pursued through a comprehensive and integrated set of programs including industrial and commercial development programs; an employment preparation and affirmative action program; and housing, community improvement, community facilities and community services programs designed to revitalize older residential neighbourhoods.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during 1982-83 was as follows:

Net accepted offers	47
Number of jobs expected to be created	588
Eligible capital investment associated with offers	\$ 29 129 000
DREE commitment through these offers	\$ 7 200 000
Total payments 1982-83	\$ 16 039 000

SPECIAL ARDA

The purpose of the Special ARDA agreement, entered into under the Agricultural and Rural Development Act (ARDA), was to assist in the economic development and social adjustment of residents of rural areas, particularly Native people who previously had little or no access to regular earnings and employment opportunities. Financial assistance was provided to eligible commercial undertakings or primary-producing activities for job creation and income improvement. The agreement has been extended to March 31, 1984.

DREE Special ARDA expenditures in 1982-83 in Manitoba were \$2 764 000.

S A S K A T C H E W A N

As of March 31, 1983, 12 subsidiary agreements had been signed under the GDA. Following is a brief description of activities under subsidiary agreements and other programs during 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Qu'Appelle Valley

Duration: 01/04/74 to 31/03/84

Costs shared by:

DREE	\$ 7 743 680
Environment Canada	9 000 000
Parks Canada	1 200 000
Industry, Trade and Commerce	16 320
Provincial government	15 740 000
Total estimated cost	\$ 33 700 000

DREE expenditure to date \$ 5 981 000

DREE expenditure 1982-83 \$ 1 440 000

The Qu'Appelle Valley is a major tourist attraction for Saskatchewan residents and, potentially, for out-of-province tourists.

The agreement has three main objectives: to ensure the long-term productivity of the Qu'Appelle Valley's recreation and tourism resource base; to increase the benefits from utilization of this resource base; and to improve the management of land and water resources. Environment Canada has a major role in the management of land and water resources through programs for river channel improvement, water quality monitoring and the control of flood-prone lands.

Some of the more successful recreational projects are those related to the production of waterfowl, the increase in sports fishing potential and the preservation of the white-tail deer population.

The tourist industry has received assistance through the commercial development incentives program under which financial assistance is made available for major renovations and new construction of tourist services and accommodation facilities. At the end of this fiscal year, a total of \$23 million had been spent on all elements of the agreement.

Northlands

Duration: 01/04/78 to 31/03/83

Costs shared by:

DREE	\$ 58 300 000
Ministry of Transport	12 500 000
Employment and Immigration	9 000 000
Indian Affairs and Northern Development	7 200 000
Provincial government	40 000 000
Total estimated cost	\$127 000 000

DREE expenditure to date \$ 51 353 000

DREE expenditure 1982-83 \$ 8 677 000

This agreement essentially continues work initiated under the Interim northlands agreement which expired March 31, 1978. The objectives of the agreement are to provide options and opportunities for northerners to participate in social and economic development; to encourage the development of the natural resources of the area and to provide the opportunity for northern residents to continue their way of life within an improved social and physical environment.

The major elements of the agreement are economic and resource development, human development, transportation and communication development and public information and consultation. This year's commitments under these elements totalled \$1.3 million, \$8.2 million, \$847 760 and \$163 120 respectively. The federal share of these committed funds amounts to \$6 297 246. Projected under these elements include Fur, Wildlife and Fish Resource Planning and Development; Economic Opportunity Identification and Assessment; Northern Business Options; Community-Based Social Development; Adult Career Development; Community Planning; Potable Water Supply and Sanitary Waste Disposal; Multi-purpose Community Facilities; Community Access Roads; and Program Review and Public Information.

Planning

Duration: 01/04/79 to 31/03/84

Costs shared by:

DREE	\$ 750 000
Provincial government	750 000
Total estimated cost	\$ 1 500 000

DREE expenditure to date	\$ 312 000
DREE expenditure 1982-83	\$ 88 000

The prime objectives of this second planning agreement are to identify and analyze economic opportunities; to conduct studies in the areas of urban social adjustment, community planning and mapping and core redevelopment in Saskatchewan; and to develop strategies, programs and subsidiary agreements pursuant to those opportunities and studies.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during 1982-83 was as follows:

Net accepted offers	15
Number of jobs expected to be created	246
Eligible capital investment associated with offers	\$ 11 309 000
DREE commitment through these offers	\$ 2 869 000
Total payments 1982-83	\$ 3 185 000

SPECIAL ARDA

The Special ARDA agreement, entered into under the Agricultural and Rural Development Act (ARDA), assisted people of native ancestry to develop new and better opportunities for improving their socioeconomic circumstances. Under this third Special ARDA agreement with Saskatchewan, geographic designation was extended to all parts of the province except the cities of Saskatoon and Regina.

The agreement expired on March 31, 1982; however, five months into this fiscal year, on September 7, 1982, a new two-year agreement was signed for a period ending on March 31, 1984. Due to uncertainty surrounding negotiations, the program did not become fully operational until late in the year, resulting in 26 offers with a federal commitment of \$944 000 for the 1982-83 period. To date, 1 060 offers have been made under Special ARDA with a total federal commitment of \$34.6 million.

ALBERTA

By March 31, 1983, seven subsidiary agreements under the GDA had been signed with Alberta. Following is a brief description of activities under the current subsidiary agreement and other programs during 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Nutritive Processing Assistance

Duration: 19/08/81 to 31/03/85

Costs shared by:

DREE	\$ 14 000 000
Provincial government	14 000 000
Total estimated cost	\$ 28 000 000

DREE expenditure to date	\$ 1 098 897
DREE expenditure 1982-83	\$ 637 735

This agreement expands on the earlier nutritive processing assistance agreement which expired on June 30, 1981. Its objectives are to strengthen the economic viability of small rural communities, and encourage the further processing in Alberta of those nutritive products which have, or may achieve, a competitive position in national or export markets through development of new technology. To date, 72 offers totalling \$8.9 million have been accepted by companies in rural Alberta, with the expectation that 323 jobs will be created. Another 170 applications were being evaluated at the end of the year under review.

Projects assisted under this agreement include: meat, dairy and vegetable processing facilities; bakeries; feedmills; and several specialty nutritive processors.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

During the year under review, one offer of assistance was made under the regional development incentives program. Total payments in 1982-83 for offers accepted in previous years amounted to \$3 606 000.

BRITISH COLUMBIA

As of March 31, 1983, 11 subsidiary agreements had been signed under the GDA. Following is a brief description of activities under subsidiary agreements and other programs during 1982-83.

SUBSIDIARY AGREEMENTS UNDER THE GDA
Industrial Development

Duration: 08/07/77 to 31/03/83

Costs shared by:

DREE	\$ 35 000 000
Provincial government	35 000 000
Total estimated cost	\$ 70 000 000

DREE expenditure to date	\$ 31 275 731
DREE expenditure 1982-83	\$ 6 510 583

The purpose of the agreement was to encourage greater sectoral and spatial diversification of economic activity, thereby improving opportunities for productive employment in the target areas and achieving a more balanced level of development among the different areas of the province.

The agreement provided for the following: research to identify and analyze industrial opportunities for communities; grant assistance to regional industrial commissions; low-interest loans to help communities service industrial parks and mills, prepare sites for specific industries and erect advance factory space; interest-free, forgivable loans to establish, modernize or expand small manufacturing or processing businesses or the maintenance and repair businesses that serve them; and public information.

A new funding arrangement, the first of its kind in Canada, was established which permits the repayments from loans extended under the industrial infrastructure program to go into a revolving fund. As a result, more than \$50 million will be available for new loans to future industrial development projects in the province. The revolving fund will effectively extend the agreement's industrial land programs until 1992.

Agriculture and Rural Development

Duration: 01/08/77 to 31/07/82

Costs shared by:

Federal government	\$ 30 000 000
Local contribution	26 750 000
Provincial government	30 000 000
Total estimated cost	\$ 86 750 000

DREE expenditure to date	\$ 15 412 000
DREE expenditure 1982-83	Nil

The objectives of this agreement were to identify research, plan and pursue new opportunities related to agriculture and rural development; to expand employment in those existing aspects of the agriculture and food-processing industries which demonstrate production and market potentials; and to sustain the growth of existing industries.

Programs were designed to encourage research training and market promotion; strengthen management and production techniques; increase the capacity of Crown range through co-ordinated planning among livestock, forestry and wildlife users; develop farmland that has potential for increased production; and provide assistance for secondary food processing to improve rural employment opportunities.

Federal responsibility for this agreement was transferred to Agriculture Canada during 1982-83.

Travel Industry Development

Duration: 17/10/78 to 17/10/83

Costs shared by:

DREE	\$ 25 000 000
Provincial government	25 000 000
Total estimated cost	\$ 50 000 000

DREE expenditure to date	\$ 20 723 699
DREE expenditure 1982-83	\$ 2 116 410

The purpose of the agreement is to strengthen the role of the travel industry in the province's economic development. Programs are designed to develop long-term strategies for the travel industry by identifying trends, gaps and future directions, and by conducting feasibility and opportunity studies; to develop the institutional structure needed to co-ordinate travel industry associations; to upgrade travel industry facilities and infrastructure; to support creation, improvement or expansion of major travel generators such as cultural centres, special interest parks, historic sites and develop natural attractions; and to aid development of world-class ski resorts offering year-round multi-use recreation facilities.

response to the programs has been enthusiastic - so much so that the program funds have been heavily oversubscribed. Consequently, applications are no longer being encouraged as the majority of the funds in the agreement will probably be required to accommodate proposals already in hand.

Intensive Forest Management

Duration: 17/05/79 to 31/03/84

Costs shared by:

Federal government	\$ 25 000 000
Provincial government	25 000 000
Total estimated cost	<u>\$ 50 000 000</u>

DREE expenditure to date	\$ 15 000 000
DREE expenditure 1982-83	Nil

The purpose of this agreement is to strengthen the job-creating potential of the province's forest resources by increasing wood yield and expanding some of the intensive forest management programs of the province.

Program elements include reforestation of lands which have been previously logged or fire-damaged; juvenile spacing of young, dense forests to allow selected trees to grow larger and faster; fertilization; fire protection; and implementation contracts.

Federal responsibility for this agreement was transferred to Environment Canada during 1982-83.

Ridley Island Road Access

Duration: 26/11/80 to 31/03/83

Costs shared by:

Federal government	\$ 4 800 000
Provincial government	4 800 000
Total estimated cost	<u>\$ 9 600 000</u>

DREE expenditure to date	\$ 4 095 994
DREE expenditure 1982-83	\$ 294 994

The purpose of the agreement was to provide an industrial access road from provincial Highway 16 to the bulk-commodity port facility on Ridley Island near Prince Rupert. This improvement in transportation was intended to facilitate economic development in the western provinces by creating employment, income, trade and balance-of-payments benefits.

Program elements included the clearing, grubbing and construction of a seven km road and a CNR

overpass. Construction was completed during the year and the road was officially opened in September.

Federal responsibility for this agreement was transferred to Transport Canada during 1982-83.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during the fiscal year was as follows:

Net accepted offers	4
Number of jobs expected to be created	72
Eligible capital investment associated with offers	\$ 12 794 000
DREE commitment through these offers	\$ 2 076 000

Total payments 1982-83	\$ 1 330 004
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SPECIAL ARDA

This agreement, entered into under the Agriculture and Rural Development Act (ARDA), provides assistance for the establishment, expansion or modernization of commercial undertakings which provide employment for people of Native ancestry. Assistance is also available for special training needs for potential Native employees and for the community services and facilities required to support development in remote parts of the province. In contrast to other western provinces, British Columbia does not have a northlands subsidiary agreement focused on Native people; therefore Special ARDA meets many of these needs for community assistance, especially in the north. During the year under review, the agreement was extended to March 31, 1984. DREE expenditures under Special ARDA in British Columbia totalled \$2.9 million during 1982-83.

YUKON

As of March 31, 1983, two subsidiary agreements had been signed under the GDA. Following is a brief description of activities under the subsidiary agreements and other programs during 1982-1983.

SUBSIDIARY AGREEMENTS UNDER THE GDA

Renewable Resource Development

Duration: 04/04/79 to 31/03/83

Costs shared by:

DREE	\$ 3 120 000
Indian Affairs and Northern Development	1 400 000
Territorial government	2 080 000
Total estimated cost	\$ 6 600 000

DREE expenditure to date	\$ 2 064 000
DREE expenditure 1982-83	\$ 759 000

Under this agreement, the federal and territorial governments are co-operating in a joint program to expand the renewable resource information base. During the year under review, responsibility for administering the agreement was transferred to the Department of Indian Affairs and Northern Development.

Tourism Development

Duration: 24/02/80 to 31/03/83

Costs shared by:

DREE	\$ 3 600 000
Indian Affairs and Northern Development	1 500 000
Territorial government	900 000
Total estimated cost	\$ 6 000 000

DREE expenditure to date	\$ 2 911 000
DREE expenditure 1982-83	\$ 920 000

This interim agreement, which provides for tourism development, research and planning, is intended to develop a long-term strategy for the Yukon tourism industry to help counterbalance the traditional "boom or bust" pattern of Yukon's resource-based economy. During 1981-82, the agreement was extended by one year to March 31, 1983.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentives program during 1982-83 was as follows:

Net accepted offers	1
Number of jobs expected to be created	30
Eligible capital investment associated with offers	\$ 6 423 000
DREE commitment through these offers	\$ 1 285 000
Total payments 1982-83	\$ 5 000

SPECIAL ARDA

The Special ARDA agreement, entered into under the Agricultural and Rural Development Act (ARDA), was designed to assist residents, in particular those of Indian ancestry, to start commercial ventures employing Native people and to help improve the incomes of Indian people involved in such primary producing activities as hunting, trapping, fishing and forestry. The program also provided for social adjustment measures to enable people of Native ancestry to take advantage of employment and income-earning opportunities.

The Special ARDA agreement with Yukon expired on March 31, 1982 and was not renewed until November 1982.

During 1982-83, 15 offers of assistance were accepted and a total of approximately \$450 000 was committed to a variety of projects. During this period, DREE expenditures under the program amounted to \$689 000.

NORTHWEST TERRITORIES

The department has been active in the Northwest Territories since 1977. Its programs are playing a significant role in the economic life of residents of the territory. A brief description of activities under departmental programs during 1982-83 follows.

REGIONAL DEVELOPMENT INCENTIVES PROGRAM

Activity under the regional development incentive program during 1982-83 was as follows:

Net accepted offers	-
Total payments 1982-83	\$ 10 000

SPECIAL ARDA

The Special ARDA agreement, entered into under the Agricultural and Rural Development Act (ARDA), was signed with the Northwest Territories in 1977. It was designed to assist residents, in particular those of Indian and Inuit ancestry, to start expand or modernize commercial ventures employing Native people and to help improve the income of Indian and Inuit people involved in such primary producing activities as hunting, trapping and fishing. The program also provided for social adjustment measures to enable people of Native ancestry to take advantage of employment and income-earning opportunities.

The Special ARDA agreement expired on March 31, 1982. In July, 1982, approval was given to extend the Special ARDA Agreement for two years. During 1982-83, 28 offers of assistance were accepted. These offers represent a potential commitment of \$1.4 million in support of a wide variety of projects. During this period, DREE expenditures under the program amounted to \$1.1 million.

ECONOMIC DEVELOPMENT AGREEMENT

In December 21, 1982, the Ministers of Indian Affairs and Northern Development, Employment and Immigration and Industry, Trade and Commerce/Regional Economic Expansion signed the Canada/NWT Economic Development Agreement with representatives of the Government of the Northwest Territories. This agreement succeeds the Canada/NWT General Development Agreement.

REGIONAL ECONOMIC EXPANSION

Statement of Expenditures
for the Fiscal Year 1982-83 (\$000)

	Planning and Administration	Subsidiary Agreements	Industrial Incentives*	Other Programs		Total
				Budgetary	Non- Budgetary	
Head Office	23 396 ⁽¹⁾	-	315 ⁽¹⁾	15	-	23 726
Newfoundland	2 083	22 723	4 385	269	500	29 960
Nova Scotia	2 266	26 311	9 596	-	-	38 173
Prince Edward Island	931	-	1 605	17 198	-	19 734
New Brunswick	2 111	29 127	9 213	-	-	40 451
Atlantic Regional Office	4 591	-	-	1 344	-	5 935
Atlantic Development Council	317	-	-	-	-	317
Quebec	9 475	30 213	87 113	397	-	127 198
Ontario	3 267	19 242	6 320	163	-	28 992
Manitoba PFRA ⁽²⁾	2 527	11 201 633	16 039	2 629 3 940	- 956	37 925
Saskatchewan PFRA ⁽²⁾	2 309	15 141 347	3 219	2 783 34 548	-	58 347
Alberta PFRA ⁽²⁾	984	7 015	3 606	- 4 757	-	16 362
British Columbia	1 874	8 922	1 330	2 566	-	14 692
Northwest Territories	198	19	10	1 078	-	1 305
Yukon	167	1 679	5	689	-	2 540
Western Regional Office	4 510	-	-	-	-	4 510
TOTAL	61 006	172 573	142 756	72 376	1 456	450 167

(1) Includes statutory payments for employee benefits and for loan guarantees under the Regional Development Incentives Act.

(2) The Prairie Farm Rehabilitation Administration (PFRA) was transferred to the Department of Agriculture during the 1982-83 fiscal year.

REGIONAL ECONOMIC EXPANSION

Statement of Revenues
for the Fiscal Year 1982-83

	<u>(\$000)</u>
<u>Return on Investments-Interest from:</u>	
Atlantic Development Board	534
Atlantic Province Power Development Act	12 920
Special Areas and Highways Agreement	23 549
PEI Comprehensive Development Plan	947
NS Mainland Investments Limited	210
Agriculture Service Centres	1 014
South Saskatchewan River Project	566
Newfoundland and Labrador Development Corporation	2 601
Other	262
<u>Refunds of Previous Years' Expenditure</u>	8 293
<u>Services and Service Fees</u>	3 503
<u>Privileges, Licences and Permits</u>	5 380
<u>Proceeds from Sales</u>	608
<u>Other Non-Tax Revenue</u>	153

INDUSTRY, TRADE AND COMMERCE

Statement of Expenditures for the Fiscal Year 1982-83

(\$000)

Trade and Industrial Program

Operating		497 458
Grants and Contributions		
- Grants for Canadian Industry Development	674	
- Small Business Investment Grant Program	1 254	
- Enterprise Development Program	103 268	
- Defence Industry Productivity Program	131 965	
- Capital subsidies to the shipbuilding industry	73 008	
- Contributions for industry development	5 011	
- Contributions for energy research and development	2 690	
- Payment for construction of dry docks	9 544	
- Capital costs of trade centres	11 303	
- Small Businesses Loans - Losses	17 942	
- Payment of EDP Insurance losses	26 976	
- Youth and Summer Job Corps	38	
- Contributions to promote export sales	6 906	390 579
Loans and Investments (Non-Budgetary)		
- Loans to the Canadian defence industry	2 407	
- Loans to Canadian industry	8 498	
- Advances to employees on postings abroad	(618)	10 287
Program Sub-Total		<u>898 324</u>

Tourism Program

Operating	39 579
Grants and Contributions	<u>8 372</u>
Program Sub-Total	<u>47 951</u>

Grains and Oilseeds Program

Operating	3 138
Grants and Contributions	
- Prairie Grain Advance Payments Act	11 622
- Western Grain Stabilization Act	114 906
- Other	17 121
	<u>143 649</u>
Program Sub-Total	<u>146 787</u>

DEPARTMENT TOTAL	<u>1 093 062</u>
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INDUSTRY, TRADE AND COMMERCEStatement of Revenues
for the Fiscal Year 1982-83(\$000)Return on Investments

Interest on loans to Federal Business Development Bank	65 141
Interest on loans to manufacturers of automotive products	152
Interest on loans to Enterprise Development Program	412
Interest on loans to Footwear and Tanning Industries Program	10
Interest on loans to Pharmaceutical Industry Development Assistance Program	6
Interest on loans to Program for Advancement of Industrial Technology	305
Other	199

<u>Refunds of Previous Years' Expenditures</u>	20 124
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<u>Adjustment to Prior Years' Payables at Year End (PAYE)</u>	2 552
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<u>Other Non-Tax Revenue</u>	3 053
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INDUSTRY, TRADE AND COMMERCE

Grants and Contributions by Region (\$000)

	Trade Industrial Program	Tourism Program	Grains & Oilseeds Program	Total
Newfoundland	3 866	73	-	3 939
Nova Scotia	4 081	44	-	4 125
Prince Edward Island	1 744	1 474	-	3 218
New Brunswick	15 745	39	-	15 784
Quebec	136 127	1 095	-	137 222
Ontario	180 820	4 777	1 999	187 596
Manitoba	5 348	271	137 589	143 208
Saskatchewan	2 424	51	2 052	4 527
Alberta	6 982	43	1 578	8 603
British Columbia	33 346	128	-	33 474
Northwest Territories	4	-	-	4
Yukon	40	24	-	64
Outside Canada	52	353	431	836
TOTAL	390 579	8 372	143 649	542 600

APPENDIX

SUBSIDIARY AGREEMENTS ACTIVE DURING 1982-83

Agreement	Duration	Total Estimated Cost (\$)	Federal Share (\$)
NEWFOUNDLAND			
Forestry	01/06/73 to 31/03/83	66 522 155	58 178 500
Labrador	03/12/76 to 31/03/83	22 097 000	19 662 300
Tourism Development	01/01/78 to 31/03/83	13 264 600	11 938 140
Rural Development	01/04/78 to 30/09/83	16 802 000	15 122 000
Agriculture Development*	14/07/78 to 31/03/83	16 341 300	14 707 170
Industrial Development	11/06/79 to 31/03/84	26 650 000	23 985 000
Forestry 1981-86*	09/01/81 to 31/03/85	52 093 000	46 883 700
Community Development for Coastal Labrador	29/05/81 to 31/03/87	38 996 000	33 800 000
Pulp and Paper Mill Modernization	01/06/81 to 31/03/85	33 000 000	30 000 000
NOVA SCOTIA			
Metropolitan Halifax-Dartmouth Area Development	31/03/75 to 30/09/82	109 299 786	79 997 000
Traffic of Canso Area Development	31/03/75 to 31/03/84	30 057 500	22 503 400
Industrial Development	22/06/76 to 31/03/83	23 789 000	19 031 200
Tourism Development	01/04/77 to 31/03/83	13 750 000	11 000 000
Energy Conservation*	04/07/78 to 31/03/83	24 875 000	19 000 000
Halifax Panamax Dry Dock	22/01/80 to 31/03/85	57 600 000	43 900 000
Assistance to Michelin Tires (Canada) Ltd.	07/06/80 to 31/12/87	56 000 000	42 000 000

* Transferred to Sector Departments in the 1982-83 fiscal year.

Agreement	Duration	Estimated Cost (\$)	Federal Share (\$)
Modernization of Facilities at the Sydney Steel Corporation	01/04/81 to 31/03/84	96 250 000	77 000 000
Pulp and Paper Modernization	23/05/81 to 31/03/84	21 250 000	17 000 000
Ocean Industry Development	24/07/81 to 24/07/86	35 000 000	22 950 000
NEW BRUNSWICK			
Saint John and Moncton Arterial Highways*	17/02/75 to 31/03/83	51 200 000	35 840 000
Northeast New Brunswick	23/06/77 to 31/03/84	95 500 000	67 175 000
Development of Agricultural Resources*	01/04/78 to 31/03/83	34 622 500	27 698 000
Developing Regions	17/05/79 to 31/03/83	26 274 000	20 401 500
Forestry Development*	01/04/80 to 31/03/84	37 500 000	30 000 000
Pulp and Paper	27/08/80 to 31/03/84	42 250 000	33 800 000
Saint John Market Square Development*	14/10/80 to 31/03/83	10 107 300	8 085 800
Consolidated-Bathurst Inc.	30/03/82 to 31/03/89	199 500 000	19 600 000
QUEBEC			
Transport Development*	13/09/74 to 31/03/84	454 775 000	209 105 000
Industrial Infrastructure	26/03/75 to 31/03/84	137 670 000	82 602 000
Forest Development*	26/03/75 to 31/03/84	322 333 000	193 400 000
Agricultural Development*	29/03/76 to 31/03/84	103 266 000	61 960 000
Water Treatment Facilities for the Montreal Area*	30/03/78 to 31/03/83	200 000 000	120 000 000
Tourism Development	06/04/78 to 31/03/84	136 000 000	69 600 000
Public Infrastructure	16/05/78 to 30/09/82	34 876 000	23 261 000
Modernization of the Pulp and Paper Industry	15/05/79 to 31/03/84	240 000 000	135 000 000

* Transferred to Sector Departments in the 1982-83 fiscal year.

Agreement	Duration	Total Estimated Cost (\$)	Federal Share (\$)
Establishment of a Newsprint Mill in Amos	24/07/80 to 31/03/83	42 500 000	25 500 000
Société Inter-Port de Québec	03/07/81 to 31/03/84	9 250 000	5 550 000
ONTARIO			
Northeastern Ontario	25/03/76 to 31/03/83	30 602 000	15 301 000
Single-Industry Resource Communities	18/10/76 to 31/03/84	19 800 000	10 215 000
Community and Rural Resource Development	07/12/77 to 31/03/85	9 456 650	4 728 325
Forest Management*	08/12/78 to 31/03/84	82 236 500	41 118 250
Pulp and Paper Industry Facilities Improvement	15/05/79 to 31/03/84	180 000 000	60 000 000
Eastern Ontario	20/12/79 to 31/03/84	50 350 000	25 175 000
Northern Rural Development	02/03/81 to 31/03/84	18 500 000	10 000 000
Aul't Ste. Marie Infrastructure*	02/05/82 to 31/07/83	69 600 000	21 000 000
MANITOBA			
Industrial Development	01/04/78 to 31/03/83	44 000 000	26 400 000
Value-Added Crops Production*	01/04/79 to 31/03/84	18 500 000	11 100 000
Tourism Development	01/04/79 to 31/03/84	20 000 000	12 000 000
Water Development for Regional Economic Expansion and Drought Proofing*	30/05/80 to 31/03/84	8 950 000	5 350 000
Winnipeg Core Area	04/09/81 to 31/03/86	96 000 000	32 000 000
Northern Development	29/11/82 to 31/03/87	186 200 000	125 000 000
ASKATCHEWAN			
Qu'Appelle Valley	01/04/74 to 31/03/84	33 700 000	17 960 000
Northlands	01/04/78 to 31/03/83	127 000 000	87 000 000

* Transferred to Sector Departments in the 1982-83 fiscal year.

Agreement	Duration	Total Estimated Cost (\$)	Federal Share (\$)
Water Development for Regional Economic Expansion and Drought Proofing*	01/04/79 to 31/03/84	15 250 000	7 900 000
Planning 1979-84	01/04/79 to 31/03/84	1 500 000	750 000
ALBERTA			
Nutritive Processing Assistance	19/08/81 to 31/03/84	28 000 000	14 000 000
BRITISH COLUMBIA			
Industrial Development	08/07/77 to 31/03/83	70 000 000	35 000 000
Agriculture and Rural Development*	01/08/77 to 31/07/82	86 750 000	30 000 000
Travel Industry Development	17/10/78 to 17/10/83	50 000 000	25 000 000
Intensive Forest Management*	17/05/79 to 31/03/84	50 000 000	25 000 000
Ridley Island Road Access*	26/11/80 to 31/03/83	9 600 000	4 800 000
YUKON			
Renewable Resource Development*	04/04/79 to 31/03/83	6 600 000	4 520 000
Tourism Development	14/02/80 to 31/03/83	6 000 000	5 100 000

* Transferred to Sector Departments in the 1982-83 fiscal year.

Ententes	Durée	Coût estimé total (en \$)	Quote-part fédérale (en \$)
SASKATCHEWAN			
La vallée de la Qu'Appelle	du 01/04/74 au 31/03/84	33 700 000	17 960 000
Les terres septentrionales	du 01/04/78 au 31/03/83	127 000 000	87 000 000
L'aménagement hydraulique* aux fins d'expansion régionale et de lutte contre la sécheresse	du 01/04/79 au 31/03/84	15 250 000	7 900 000
La planification, 1979-1984	du 01/04/79 au 31/03/84	1 500 000	750 000
ALBERTA			
L'aide au traitement des produits alimentaires	du 19/08/81 au 31/03/84	28 000 000	14 000 000
COLOMBIE-BRITANNIQUE			
Le développement industriel	du 08/07/77 au 31/03/83	70 000 000	35 000 000
Le développement agricole et rural*	du 01/08/77 au 31/07/82	86 750 000	30 000 000
Le développement de l'industrie des voyages	du 17/10/78 au 17/10/83	50 000 000	25 000 000
La gestion forestière intensive*	du 17/05/79 au 31/03/84	50 000 000	25 000 000
La route d'accès à l'île Ridley*	du 26/11/80 au 31/03/83	9 600 000	4 800 000
YUKON			
L'exploitation des ressources renouvelables*	du 04/04/79 au 31/03/83	6 600 000	4 520 000
Le développement du tourisme	du 14/02/80 au 31/03/83	6 000 000	5 100 000

* Transférée au ministre chargé de ce secteur au cours de l'exercice 1982-1983.

Ententes	Durée	Coût estimé matif total (en \$)	Quote-part fédérale (en \$)
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La modernisation de l'industrie des pâtes et papiers	du 15/05/79 au 31/03/84	240 000 000	135 000 000
L'implantation d'une usine de papier journal à Amos	du 24/07/80 au 31/03/83	42 500 000	25 500 000
La Société Inter-Port de Québec	du 03/07/81 au 31/03/84	9 250 000	5 550 000

ONTARIO

Le nord-est de l'Ontario	du 25/03/76 au 31/03/83	30 602 000	15 301 000
Les localités à industrie unique	du 18/10/76 au 31/03/84	19 800 000	10 215 000
La mise en valeur des ressources communautaires et rurales	du 07/12/77 au 31/03/85	9 456 650	4 728 325
La gestion forestière*	du 08/12/78 au 31/03/84	82 236 500	41 118 250
La modernisation des usines de pâtes et papiers	du 15/05/79 au 31/03/84	180 000 000	60 000 000
L'est de l'Ontario	du 20/12/79 au 31/03/84	50 350 000	25 175 000
Le développement rural dans le nord	du 02/03/81 au 31/03/84	18 500 000	10 000 000
Les infrastructures de Sault-Sainte-Marie*	du 02/05/82 au 31/07/83	69 600 000	21 000 000

MANITOBA

Le développement industriel	du 01/04/78 au 31/03/83	44 000 000	26 400 000
La production des cultures à forte valeur ajoutée*	du 01/04/79 au 31/03/84	18 500 000	11 100 000
Le développement touristique	du 01/04/79 au 31/03/84	20 000 000	12 000 000
L'aménagement hydraulique* aux fins d'expansion régionale et de lutte contre la sécheresse	du 30/05/80 au 31/03/84	8 950 000	5 350 000
Le centre ville de Winnipeg	du 04/09/81 au 31/03/86	96 000 000	32 000 000
Le développement du nord	du 29/11/82 au 31/03/87	186 200 000	125 000 000

* Transférée au ministère chargé de ce secteur au cours de l'exercice 1982-1983.

Ententes	Durée	Coût estimé matif total (en \$)	Quote-part fédérale (en \$)
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La modernisation des installations de
la Sydney Steel Corporation

du 01/04/81 au 31/03/84

96 250 000

77 000 000

La modernisation des installations de
l'industrie des pâtes et papiers

du 23/05/81 au 31/03/84

21 250 000

17 000 000

Le développement de l'industrie
océanique

du 24/07/81 au 24/07/86

35 000 000

22 950 000

NOUVEAU-BRUNSWICK

Les grandes artères de Saint-Jean
et de Moncton*

du 17/02/75 au 31/03/83

51 200 000

35 840 000

Le nord-est du Nouveau-Brunswick

du 23/06/77 au 31/03/84

95 500 000

67 175 000

La mise en valeur des ressources
agricoles*

du 01/04/78 au 31/03/83

34 622 500

27 698 000

Les régions en voie de développement

du 17/05/79 au 31/03/83

26 274 000

20 401 500

Le développement des forêts*

du 01/04/80 au 31/03/84

37 500 000

30 000 000

L'industrie des pâtes et papiers

du 27/08/80 au 31/03/84

42 250 000

33 800 000

Le réaménagement du Market Square
à Saint-Jean*

du 14/10/80 au 31/03/83

10 107 300

8 085 800

La modernisation de l'usine de la
Consolidated-Bathurst Inc.

du 30/03/82 to 31/03/89

199 500 000

19 600 000

QUÉBEC

Le développement des transports*

du 13/09/74 au 31/03/84

454 775 000

209 105 000

Les infrastructures industrielles

du 26/03/75 au 31/03/84

137 670 000

82 602 000

Le développement forestier*

du 26/03/75 au 31/03/84

322 333 000

193 400 000

Le développement agricole*

du 29/03/76 au 31/03/84

103 266 000

61 960 000

L'assainissement des eaux de la
région de Montréal*

du 30/03/78 au 31/03/83

200 000 000

120 000 000

Le développement touristique

du 06/04/78 au 31/03/84

136 000 000

69 600 000

Les équipements publics

du 16/05/78 au 30/09/82

34 876 000

23 261 000

* Transférée au ministère chargé de ce secteur au cours de l'exercice 1982-1983.

A P P E N D I C E

ENTENTES AUXILIAIRES EN VIGUEUR AU COURS DE L'EXERCICE 1982-1983

Ententes	Durée	Coût estimé matif total (en \$)	Quote-part fédérale (en \$)
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TERRE-NEUVE

Les forêts 58 178 500

Le Labrador 19 662 300

La promotion du tourisme 11 938 140

Le développement rural 15 122 000

Le développement agricole* 14 707 170

Le développement industriel 23 985 000

Les forêts, 1981-1986* 46 883 700

Le développement communautaire de la région côtière du Labrador 33 800 000

La modernisation des usines de pâtes et papiers 30 000 000

NOUVELLE-ÉCOSSE

Le développement de la zone métropolitaine de Halifax-Dartmouth 79 997 000

Le développement de la zone du détroit de Canso 22 503 400

Le développement industriel 19 031 200

La promotion du tourisme 11 000 000

La conservation de l'énergie* 19 000 000

La cale sèche Panamax à Halifax 43 900 000

L'aide à la société des pneus Michelin du Canada ltée 42 000 000

* Transférée au ministre chargé de ce secteur au cours de l'exercice 1982-1983.

INDUSTRIE ET COMMERCE

Subventions et contributions par région
(en milliers de dollars)

Programme des céréales et des graines oléagineuses	Programme du tourisme	Programme commercial et industriel		
Total				
			Terre-Neuve	3 939
			Nouvelle-Ecosse	4 125
			Île-du-Prince Édouard	3 218
			Nouveau-Brunswick	15 784
			Québec	137 222
			Ontario	187 596
			Manitoba	143 208
			Saskatchewan	4 527
			Alberta	8 603
			Colombie-Britannique	33 474
			Territoires du Nord-Ouest	4
			Yukon	64
			A l'étranger	836
			TOTAL	542 600

INDUSTRIE ET COMMERCE

Etat des revenus pour
l'exercice financier 1982-1983
(en milliers de dollars)

Revenus provenant d'investissements	
Intérêts sur les prêts consentis :	
- à la Banque fédérale de développement	65 141
- à l'industrie des produits de l'automobile	152
- aux entreprises dans le cadre du programme d'expansion des entreprises	412
- aux entreprises dans le cadre du programme de redressement des industries de la chaussure et du cuir	10
- aux entreprises dans le cadre du programme d'aide au développement de l'industrie pharmaceutique	6
- aux entreprises dans le cadre du programme pour l'avancement de la technologie	305
Autres	199
Remboursement de dépenses effectuées au cours de l'exercice précédent	20 124
Ajustement relatif aux exercices précédents - comptes à payer en fin d'exercice	2 552
Autres revenus non fiscaux	3 053

INDUSTRIE ET COMMERCE

Programme de l'expansion commerciale et industrielle		TOTAL DES DÉPENSES DU MINISTÈRE	
Dépenses d'exploitation		1 093 062	
Subventions et contributions			
- Subventions pour l'expansion de l'industrie canadienne			
- Programme de subventions aux investissements des petites entreprises			
- Programme d'expansion des entreprises			
- Programme de productivité de l'industrie du matériel de défense			
- Aide à la construction de navires			
- Contributions à l'expansion de l'industrie			
- Contributions à la recherche et au développement dans le secteur de l'énergie			
- Paiement pour la construction de cales sèches			
- Coûts d'immobilisation des centres de commerce			
- Prêts aux petites entreprises - pertes			
- Assurances-prêts - PEE			
- Compagnie des jeunes travailleurs et des travailleurs d'été			
- Contributions en vue de promouvoir les ventes à l'exportation			
Prêts et investissements (poste non budgétaire)			
- Prêts à l'industrie canadienne du matériel de défense			
- Prêts à l'industrie canadienne			
- Avances aux employés délégués à l'étranger			
Total partiel du programme		898 324	
Programme du tourisme			
Frais d'exploitation			
Subventions et contributions			
Total partiel du programme		47 951	
Programme des céréales et des graines oléagineuses			
Frais d'exploitation			
Subventions et contributions			
- Loi sur les paiements anticipés pour le grain des Prairies			
- Loi de stabilisation concernant le grain de l'Ouest			
- Autres			
Total partiel du programme		146 787	
		1 093 062	

EXPANSION ÉCONOMIQUE RÉGIONALE

État des revenus pour
l'exercice financier 1982-1983
(en milliers de dollars)

Revenus provenant d'investissements- intérêts de :	
Office d'expansion économique de la région de l'Atlantique	534
Loi sur la mise en valeur de l'énergie dans les provinces de l'Atlantique	12 920
Entente sur le développement des zones spéciales et des voies publiques	23 549
Plan d'ensemble de développement de l'Île-du-Prince-Édouard	947
NS Mainland Investments Limited	210
Centres de services agricoles	1 014
Projet de la rivière Saskatchewan-Sud	566
Société de développement de Terre-Neuve et du Labrador	2 601
Autres	262
Remboursements de dépenses effectuées au cours de l'exercice précédent	8 293
Services et frais de services	3 503
Privilèges, licences et permis	5 380
Produits des ventes	608
Autres revenus non fiscaux	153

EXPANSION ÉCONOMIQUE RÉGIONALE

État des dépenses
pour l'exercice financier 1982-1983

Autres programmes

Planification et administration	Ententes auxiliaires	Subventions à l'industrie	Dépenses budgétaires	Dépenses non budgétaires	Total
Administration centrale	23 396 ¹	-	315 ¹	15	23 726
Terre-Neuve	2 083	22 723	4 385	269	29 960
Nouvelle-Écosse	2 266	26 311	9 596	-	38 173
Île-du-Prince-Édouard	931	-	1 605	17 198	19 734
Nouveau-Brunswick	2 111	29 127	9 213	-	40 451
Bureau régional de l'Atlantique	4 591	-	-	1 344	5 935
Conseil de développement de la région de l'Atlantique	317	-	-	-	317
Québec	9 475	30 213	87 113	397	127 198
Ontario	3 267	19 242	6 320	163	28 992
Manitoba	2 527	11 201	16 039	2 629	37 925
Manitoba ARAP ²	2 527	663	-	956	-
Saskatchewan ARAP ²	2 309	15 141	3 219	2 783	58 347
Alberta ARAP ²	984	7 015	3 606	-	16 362
Colombie-Britannique	1 874	8 922	1 330	2 566	14 692
Territoires du Nord-Ouest	198	19	10	1 078	1 305
Yukon	167	1 679	5	689	2 540
Bureau régional de l'Ouest	4 510	-	-	-	4 510
TOTAL	61 006	172 573	142 756	72 376	450 167

1. Comprend les versements statutaires des prestations des employés et ceux prévus aux termes des garanties de prêts de la Loi sur les subventions au développement régional.

2. L'Administration du r  tablissement agricole des Prairies a   t   transf  r  e au minist  re de l'Agriculture au cours de l'exercice 1982-1983.

L'ENTENTE SPECIALE ARDA

L'entente spéciale ARDA, signée en vertu de la Loi sur l'aménagement rural et le développement agricole (ARDA), a été conclue avec les territoires du Nord-Ouest en 1977. Elle était destinée à aider les habitants, particulièrement ceux d'ascendance indienne et Inuit, à lancer, mettre en valeur ou moderniser des entreprises commerciales employant des autochtones et à contribuer à l'accroissement des revenus des Indiens et des Inuit qui exercent des activités de production primaire telles que la chasse, le piégeage et la pêche. Le programme prévoyait également certaines mesures d'adaptation sociale afin de permettre aux autochtones de tirer parti des possibilités d'emploi et de revenu.

L'entente spéciale ARDA est venue à expiration le 31 mars 1982, mais au mois de juillet suivant, sa prolongation fut approuvée pour une période de deux ans. En 1982-1983, 28 offres d'aide financière ont été acceptées et une somme totale d'environ 1,4 million de dollars a été consacrée à une grande variété de projets. Pendant cette période, les dépenses du MEER aux termes du programme se sont élevées à 1 078 000 \$.

L'ENTENTE DE DEVELOPPEMENT ECONOMIQUE

Le 21 décembre 1982, les ministres des Affaires Indiennes et du Nord, de l'Emploi et du Commerce et de l'Expansion économique régionale concluent avec des représentants du gouvernement des territoires du Nord-Ouest l'entente de développement économique Canada - T.N.-O. laquelle remplace l'entente-cadre de développement Canada - T.N.-O.

L'entente spéciale ARDA conclue avec le Yukon est venue à expiration le 31 mars 1982 et n'avait pas été renouvelée avant novembre 1982.

Au cours de l'année à l'étude, 15 offres d'aide financière ont été acceptées et une somme totale d'environ 450 000 \$ a été consacrée à une grande variété de projets. Pendant cette période, les dépenses du MEER aux termes du programme se sont élevées à 689 000 \$.

LES TERRITOIRES DU NORD-OUEST

La présence du ministère dans les territoires du Nord-Ouest ne remonte qu'au début de 1977. Ses programmes jouent un rôle important dans la vie économique des habitants de cette région. Voici une brève description des activités entreprises en vertu des programmes du ministère en 1982-1983.

LE PROGRAMME DE SUBVENTIONS AU DEVELOPPEMENT REGIONAL

Le programme de subventions au développement régional a donné lieu, au cours de l'exercice financier, aux activités suivantes :

Nombre net d'offres acceptées	-
Total des versements en	10 000 \$
1982-1983	

L'ENTENTE SPECIALE ARDA

La Loi sur l'aménagement rural et le développement agricole (ARDA), prévoit de l'aide à l'établissement, à l'expansion ou à la modernisation d'entreprises commerciales qui donneraient de l'emploi aux personnes d'ascendance autochtone. En outre, l'entente prévoit une aide à la formation spéciale des employés autochtones éventuels et aux services et installations communautaires nécessaires pour appuyer le développement dans les zones éloignées de la province. Contrairement aux autres provinces de l'Ouest, la Colombie-Britannique n'a pas conclu d'entente sur les terres septentrionales centrées sur les autochtones; l'entente spéciale ARDA répondait donc à un grand nombre de besoins d'aide des communautés, spécialement celles qui sont situées dans le Nord. Au cours de l'année à l'étude, l'entente a été prolongée jusqu'au 31 mars 1984. Les dépenses du MEER aux termes de l'entente spéciale ARDA en Colombie-Britannique se sont chiffrees à 2,9 millions de dollars en 1982-1983.

LE YUKON

Au 31 mars 1983, deux ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de développement (ECD). Voici une brève description des activités entreprises en 1982-1983 dans le cadre de ces ententes auxiliaires et des autres programmes.

LES ENTENTES AUXILIAIRES

L'exploitation des ressources renouvelables

Durée : 4 avril 1979 au 31 mars 1983
Répartition des coûts :

MEER	3 120 000 \$
Affaires indiennes et du Nord	1 400 000 \$
Gouvernement territorial	2 080 000 \$
Coût estimatif total	6 600 000 \$
Dépenses du MEER à ce jour	2 064 000 \$
Dépenses du MEER en 1982-1983	759 000 \$

En vertu de cette entente, les gouvernements fédéral et territorial participent à un programme commun ayant pour but d'augmenter la base des données relatives aux ressources renouvelables. Au cours de l'année à l'étude, la responsabilité de cette entente a été transférée au ministère des Affaires indiennes et du Nord.

Le développement du tourisme

Durée : 14 février 1980 au 31 mars 1983
Répartition des coûts :

MEER	3 600 000 \$
Affaires indiennes et du Nord	1 500 000 \$
Gouvernement territorial	900 000 \$
Coût estimatif total	6 000 000 \$
Dépenses du MEER à ce jour	2 911 000 \$
Dépenses du MEER en 1982-1983	920 000 \$

Cette entente provisoire, qui porte sur le développement du tourisme, la recherche et la planification, prévoit l'élaboration d'une stratégie à long terme pour l'industrie du tourisme du Yukon afin d'aider à contrebalancer le modèle traditionnel de l'économie fondée sur les ressources de cette région qui semble aller d'un extrême à l'autre. Au cours de l'année à l'étude, cette entente a été prorogée jusqu'au 31 mars 1983.

LE PROGRAMME DE SUBVENTIONS AU DEVELOPPEMENT REGIONAL

Le programme de subventions au développement régional a donné lieu, au cours de l'exercice financier, aux activités suivantes :

Nombre net d'offres acceptées	1
Prévision du nombre d'emplois créés	30

Investissements au titre de l'actif admissible	6 423 000 \$
Engagements du MEER au chapitre de ces offres	1 285 000 \$
Total des versements en 1982-1983	5 000 \$

L'ENTENTE SPECIALE ARDA

L'entente spéciale ARDA, signée en vertu de la Loi sur l'aménagement rural et le développement agricole (ARDA), était destinée à aider les habitants, particulièrement ceux d'ascendance indienne, à lancer des entreprises commerciales employant des autochtones et à contribuer à l'amélioration des revenus des Indiens qui exercent des activités de production primaire telles que la chasse, le piégeage, la pêche et l'exploitation forestière. Le programme prévoyait également certaines mesures d'adaptation sociale afin de permettre aux autochtones de tirer parti des possibilités d'emploi et de revenu gagné.

La route d'accès à Little Ridley

Durée : 26 novembre 1980 au 31 mars 1983	
Répartition des coûts :	
Gouvernement fédéral	4 800 000 \$
Gouvernement provincial	4 800 000 \$
Coût estimatif total	9 600 000 \$
Depenses du MEER à ce jour	4 095 994 \$
Depenses du MEER en 1982-1983	294 994 \$

Le but de la présente entente était de permettre l'aménagement d'un accès routier industriel reliant la route provinciale 16 aux installations portuaires pour les marchandises en vrac sur l'île Ridley, près de Prince-Rupert. Cette amélioration dans le domaine du transport devait favoriser le développement économique des provinces de l'Ouest en créant des emplois, des revenus, des activités commerciales et des avantages qui découleraient de la balance des paiements.

Les éléments de programme comprenaient le défrichement, le dessouchage et la construction d'une route de 7 km, ainsi que l'érection d'un viaduc du CN. Les travaux de construction ont été terminés au cours de l'année et la route a été ouverte à la circulation en septembre.

La responsabilité fédérale de cette entente a été transférée à Transports Canada en 1982-1983.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Le programme de subventions au développement régional a donné lieu, au cours de l'exercice financier, aux activités suivantes :

Nombre net d'offres acceptées	4
Prévision du nombre d'emplois créés	72
Investissements au titre de l'actif admissible	12 794 000 \$
atférénts à ces offres	
Engagements du MEER au chapitre de ces offres	2 076 000 \$
Total des versements en 1982-1983	1 330 004 \$

visaient également à instaurer des structures institutionnelles nécessaires à la coordination des associations de l'industrie des voyages, à améliorer les installations et l'infrastructure relatives à cette industrie, à appuyer la création, l'amélioration ou le développement des principaux stimulants de voyages tels les centres culturels, les parcs d'intérêt spécial, les lieux historiques et les attractions naturelles, et enfin, à appuyer l'aménagement de stations de ski internationales offrant des installations multirécréatives tout au long de l'année.

Les programmes ont soulevé une réaction enthousiaste, au point que beaucoup trop de gens ont soumis des demandes de fonds. Par conséquent, on n'encourage plus la présentation de demandes, car il semble bien que la majorité des fonds disponibles dans le cadre de l'entente seront consacrés aux propositions déjà soumises.

La gestion forestière intensive

Durée : 17 mai 1979 au 31 mars 1984

Répartition des coûts :	
Gouvernement fédéral	25 000 000 \$
Gouvernement provincial	25 000 000 \$
Coût estimatif total	50 000 000 \$
Depenses du MEER à ce jour	15 000 000 \$
Depenses du MEER en 1982-1983	Néant

L'objectif de cette entente consiste à augmenter les perspectives de création d'emplois que renferment les ressources forestières en accroissant le rendement en bois et en élargissant certains programmes de gestion forestière intensive de la province.

Les éléments du programme sont les suivants : le reboisement des terres déjà endommagées par l'abattage et les incendies, l'espacement des jeunes arbres et des forêts denses afin de permettre aux arbres sélectionnés de croître davantage et plus rapidement, la fertilisation, la protection contre les incendies et les contrats de mise en oeuvre.

La responsabilité fédérale de cette entente a été transférée à Environnement Canada en 1982-1983.

développement (ECD). On trouvera dans les pages suivantes une brève description des activités entreprises dans le cadre des ententes auxiliaires et des autres programmes en 1982-1983.

LES ENTENTES AUXILIAIRES

Le développement industriel

Durée : 8 juillet 1977 au 31 mars 1983

Répartition des coûts :

MEER	35 000 000 \$
Gouvernement provincial	35 000 000
Coût estimatif total	<u>70 000 000 \$</u>
Dépenses du MEER à ce jour	31 275 731 \$
Dépenses du MEER en 1982-1983	6 510 583 \$

Cette entente a pour objectifs de favoriser une plus grande diversification sectorielle et spatiale des activités économiques et d'accroître ainsi les possibilités d'emploi productif dans les régions visées, ce qui permettra d'atténuer un niveau de développement plus équilibré entre les différentes régions de la province.

L'entente comprend les éléments suivants : de la recherche afin de déterminer et d'analyser les possibilités industrielles pour les localités, des subventions aux commissions industrielles régionales, des prêts à faible taux d'intérêt pour aider les localités à viabiliser des zones et des malls industriels, à aménager des emplacements destinés à certaines industries et à construire à l'avance des locaux pour les entreprises de fabrication; des prêts sans intérêt et des prêts-subventions pour l'implantation, la modernisation ou l'agrandissement de petites entreprises de fabrication ou de transformation ou des entreprises d'entretien et de réparation qui y sont reliées; et l'information du public.

En ce qui concerne le financement, on a mis en place un nouvel arrangement, le premier du genre au Canada, par lequel les sommes versées en remboursement des prêts consentis aux termes du programme sur l'infrastructure industrielle iront dans un fonds renouvelable. Ainsi, plus de 50 millions de dollars pourront à nouveau être prêtés pour réaliser d'autres projets de développement industriel en Colombie-Britannique. Le nouveau fonds renouvelable permettra de prolonger efficacement jusqu'en 1992 les programmes d'aménagement de terrains industriels dans le cadre de l'entente.

Le développement agricole et rural

Durée : 1^{er} août 1977 au 31 juillet 1982

Répartition des coûts :

Gouvernement fédéral	30 000 000 \$
Contribution locale	26 750 000
Gouvernement provincial	86 000 000
Coût estimatif total	<u>86 750 000 \$</u>
Dépenses du MEER à ce jour	15 412 000 \$
Dépenses du MEER en 1982-1983	Néant

Cette entente a pour objectifs d'identifier, de rechercher, de planifier et d'exploiter les nouvelles possibilités reliées au développement agricole et rural, d'augmenter les emplois dans les secteurs des industries de l'agriculture et de la transformation des denrées qui offrent des possibilités sur les plans de la production et des marchés et d'appuyer l'essor des industries en place.

Les programmes sont conçus pour favoriser la gestion et de production, pour accroître la productivité des terres de l'État par la planification coordonnée des activités de l'élevage, des terres forestières et des réserves fauniques, pour augmenter la production des terres agricoles qui en ont le potentiel et pour aider l'industrie de la transformation secondaire des denrées en vue d'accroître les possibilités d'emploi rural.

La responsabilité fédérale de cette entente a été transférée à Agriculture Canada en 1982-1983.

Le développement de l'industrie des voyages

Durée : 17 octobre 1978 au 17 octobre 1983

Répartition des coûts :

MEER	25 000 000 \$
Gouvernement provincial	25 000 000
Coût estimatif total	<u>50 000 000 \$</u>
Dépenses du MEER à ce jour	20 723 695 \$
Dépenses du MEER en 1982-1983	2 116 410 \$

Cette entente avait pour objectif de renforcer le rôle joué par l'industrie des voyages dans le développement économique de la province. Les programmes visaient à élaborer des stratégies à long terme pour l'industrie des voyages en relevant les tendances, les lacunes et les orientations futures et en menant des études de faisabilité et de possibilité. Ces programmes

LES ENTENTES AUXILIAIRES

L'aide au traitement des produits alimentaires

Durée : 19 août 1981 au 30 mars 1985

Répartition des coûts :

MEER	14 000 000 \$
Gouvernement provincial	14 000 000
Coût estimatif total	28 000 000 \$

Dépenses du MEER à ce jour 1 098 897 \$

Dépenses du MEER en 1982-1983 637 735 \$

Cette entente est la prolongation de la précédente qui a pris fin le 30 juin 1981; elle a pour objectifs de renforcer la viabilité économique des petites agglomérations rurales et d'accroître, en Alberta, la transformation des produits alimentaires qui ont occupé ou qui pourraient occuper une place concurrentielle sur les marchés intérieurs et étrangers, grâce à la mise au point de nouvelles techniques. Jusqu'à présent, 73 offres ont été acceptées par des entreprises des régions rurales de l'Alberta, ce qui représente des contributions de 8 940 273 \$, lesquelles devraient amener la création de 323 emplois. On procédait, à la fin de l'année à l'étude, à l'évaluation de 170 autres demandes d'aide.

Au nombre des projets subventionnés jusqu'à présent aux termes de cette entente, on compte des installations de préparation de la viande, de produits laitiers et de légumes, des pâtisseries, des usines d'aliments et plusieurs entreprises de transformation d'aliments nutritifs spéciaux.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Au cours de l'année à l'étude, aucune offre d'aide n'a été faite aux termes du programme de subventions au développement régional. Le total des versements effectués au titre des offres acceptées antérieurement s'élevait à 3 600 000 \$ en 1982-1983.

LA COLOMBIE-BRITANNIQUE

Au 31 mars 1983, 11 ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de

Nombre net d'offres acceptées 15 \$

Prévision du nombre d'emplois créés 246 \$

Investissements au titre de l'actif admissible 11 309 000 \$

Engagements du MEER au chapitre de ces offres 2 869 000 \$

Total des versements en 1982-1983 3 185 000 \$

L'ENTENTE SPÉCIALE ARDA

L'entente spéciale ARDA, conclue en vertu de la Loi sur l'aménagement rural et le développement agricole (ARDA), apportait de l'aide aux habitants d'origine indienne afin de favoriser les possibilités d'amélioration de leur situation économique et socio-économique ou d'en créer de nouvelles. Dans le cadre de cette troisième entente spéciale ARDA conclue avec la Saskatchewan, la désignation géographique s'étendait à toutes les parties de la province, à l'exception des villes de Saskatoon et de Regina.

L'entente a pris fin le 31 mars 1982. Toutefois, cinq mois plus tard, soit le 7 septembre 1982, une nouvelle entente a été signée pour une période de deux ans se terminant le 31 mars 1984. En raison des incertitudes concernant les négociations, le programme n'est devenu entièrement opérationnel qu'à la fin de l'exercice; de ce fait, 26 offres seulement ont été faites en 1982-1983, et la contribution du gouvernement fédéral s'est élevée à 944 000 \$. Jusqu'à présent, 1 060 offres ont été faites en vertu de l'entente spéciale ARDA et le gouvernement fédéral y a consacré, au total, 34 575 890 \$.

L'ALBERTA

Au 31 mars 1983, sept ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de développement (ECD) avec l'Alberta. On trouvera, dans les pages suivantes, une brève description des activités entreprises dans le cadre de l'entente auxiliaire en vigueur et des autres programmes au cours de 1982-1983.

La vallée de la Qu'Appelle constitue l'un des principaux endroits touristiques pour les habitants de la Saskatchewan et pour les touristes venant de l'extérieur de la province.

Cette entente comporte trois principaux objectifs : assurer la productivité à long terme des ressources touristiques et récréatives de la vallée de la Qu'Appelle, accroître les avantages qui découlent de l'utilisation de ces ressources et améliorer la gestion des ressources en terre et en eau. Environnement Canada joue un rôle important dans la gestion des ressources en terre et en eau par le biais de programmes d'amélioration de la capacité d'écoulement des rivières, par la surveillance de la qualité de l'eau et par la maîtrise de l'inondation des terres.

Parmi les programmes récréatifs les plus réussis, on compte ceux touchant l'élevage d'oiseaux aquatiques, l'accroissement du potentiel de la pêche sportive et la préservation des cerfs à queue blanche.

L'industrie touristique a été subventionnée par le biais du programme de subventions au développement commercial en vertu duquel on accorde de l'aide financière pour les travaux de rénovation majeurs et de construction de centres de services touristiques et d'hébergement.

A la fin de l'exercice financier, les dépenses effectuées pour tous les volets de l'entente ont totalisé 22 965 000 \$.

Les terres septentrionales

Durée : 1^{er} avril 1978 au 31 mars 1983

Répartition des coûts :

MEER	58 300 000 \$
Ministère des Transports	12 500 000
Emploi et Immigration	9 000 000
Affaires Indiennes et du Nord	7 200 000
Gouvernement provincial	40 000 000
Coût estimatif total	127 000 000 \$
Dépenses du MEER à ce jour	51 353 000 \$
Dépenses du MEER en 1982-1983	8 677 000 \$

Par cet accord, on poursuit essentiellement le travail entrepris dans le cadre de l'entente provisoire sur les terres septentrionales qui a pris fin le 31 mars 1978. Elle a pour objet d'assurer aux gens du Nord des choix et des possibilités de participation au développement

social et économique, de favoriser la mise en valeur des ressources naturelles de la région et d'offrir aux résidents du Nord la possibilité de conserver leur mode de vie dans un cadre physique et social amélioré.

Les principaux éléments de cette entente ont trait au développement économique et à la mise en valeur des ressources, à l'épanouissement humain, au développement des transports et des communications, à l'information et à la consultation. Au cours de l'exercice, les fonds engagés relativement à ces éléments ont totalisé 1 295 450 \$, 8 189 080 \$, 847 760 \$ et 163 120 \$, respectivement. La contribution du gouvernement fédéral s'est élevée à 6 297 246 \$. Les projets liés à ces éléments comprennent notamment : planification et exploitation des ressources naturelles : fourrures, faune et pêche; recherche et évaluation des possibilités économiques; choix d'entreprises commerciales dans le Nord; développement social dans la communauté; perfectionnement professionnel des adultes; planification communautaire; approvisionnement en eau potable et élimination des déchets; installations communautaires polyvalentes; chemins d'accès communautaires; étude des programmes; et, information du public.

La planification, 1979-1984

Durée : 1^{er} avril 1979 au 31 mars 1984

Répartition des coûts :

MEER	750 000 \$
Gouvernement provincial	750 000
Coût estimatif total	1 500 000 \$
Dépenses du MEER à ce jour	312 000 \$
Dépenses du MEER en 1982-1983	88 000 \$

Les principaux objectifs de la deuxième entente sur la planification sont les suivants : recenser et analyser les possibilités de développement économique, effectuer des études d'adaptation sociale urbaine, de planification communautaire et de cartographie, et de réaménagement des noyaux urbains en Saskatchewan, et élaborer les stratégies, programmes et ententes auxiliaires découlant de ces possibilités et de ces études.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

La responsabilité fédérale de cette entente a été transférée à Agriculture Canada en 1982-1983.

Le centre ville de Winnipeg

Durée : 4 septembre 1981 au 31 mars 1986

Répartition des coûts :

MEER	32 000 000 \$
Ville de Winnipeg	32 000 000
Gouvernement provincial	32 000 000
Cout estimatif total	<u>96 000 000 \$</u>

Dépenses du MEER à ce jour 5 002 000 \$

Dépenses du MEER en 1982-1983 3 583 000 \$

L'entente tripartite Canada-Manitoba-Winnipeg tient compte de la situation socio-économique du centre ville et des quartiers avoisinants. Cette zone englobe le centre ville et les vieux quartiers entourant Winnipeg et représente le cinquième de la population de la ville. Elle a de tout temps joué un rôle de premier plan dans le développement du Manitoba et de l'Ouest. Cependant, au cours des trente dernières années de croissance suburbaine rapide, ses forces et ses possibilités ont été assombries par une certaine détérioration sociale, économique et physique.

L'entente a pour objectifs de fournir de plus grandes possibilités d'emploi, de favoriser le développement industriel, commercial et résidentiel approprié et de revivifier le milieu physique et social du centre ville et, enfin, de faciliter l'efficacité participation sociale et économique des habitants du centre ville aux possibilités de développement.

On s'appliquera à atteindre ces objectifs en mettant sur pied un ensemble de programmes exhaustifs et intégrés dont les suivants : des programmes de développement industriel et commercial, un programme d'emploi et d'action positive et des programmes touchant le logement, l'amélioration communautaire, les installations et les services communautaires, et ce en vue de revitaliser les vieux quartiers résidentiels.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées 47

Crées 588

Investissements au titre de l'actif admissible

attribution à ces offres 29 129 000 \$

Engagements du MEER au chapitre de ces offres 7 200 000 \$

Total des versements en 1982-1983 16 039 000 \$

L'ENTENTE SPÉCIALE ARDA

L'entente spéciale ARDA, conclue en vertu de la Loi sur l'aménagement rural et le développement agricole (ARDA), visait à favoriser le développement économique et l'adaptation sociale des populations rurales, en particulier celles d'origine autochtone, qui n'avaient eu jusqu'ici aucun accès ou fort peu à des revenus et à des emplois réguliers. Une aide financière était fournie aux entreprises commerciales ou de fabrication primaires en vue de créer des emplois et d'augmenter les revenus. L'entente a été prolongée jusqu'au 31 mars 1984.

Les dépenses du MEER aux termes de l'entente spéciale ARDA ont été de l'ordre de 2 764 000 \$ en 1982-1983.

LA SASKATCHEWAN

LES ENTENTES AUXILIAIRES

La vallée de la Qu'Appelle

Durée : 1^{er} avril 1974 au 31 mars 1984

Répartition des coûts :

MEER	7 743 680 \$
Environnement Canada	9 000 000
Parcs Canada	1 200 000
Industrie et Commerce	16 320
Gouvernement provincial	15 740 000
Cout estimatif total	<u>33 700 000 \$</u>

Dépenses du MEER à ce jour 5 981 000 \$

Dépenses du MEER en 1982-1983 1 440 000 \$

Le développement industriel

Durée : 1^{er} avril 1978 au 31 mars 1983

Répartition des coûts :

MEEER	26 400 000 \$
Gouvernement provincial	17 600 000
Coût estimatif total	44 000 000 \$

Dépenses du MEEER à ce jour 11 644 000 \$

Dépenses du MEEER en 1982-1983 4 622 000 \$

Cette entente a pour objectifs d'accélérer le processus de développement industriel dans la province, grâce à la connaissance et à la promotion de possibilités de développement industriel et aux transferts de technologie, appuyer les petites entreprises et de diminuer les coûts de l'infrastructure industrielle reliés à l'emplacement des usines.

Au Manitoba, les industries prioritaires, qui ont une importance pour l'économie provinciale, sont les aliments et les boissons, les produits sanitaires, la machinerie légère, le matériel de transport, ainsi que les instruments électroniques et aérospatiaux.

La production des cultures à forte valeur ajoutée

Durée : 1^{er} avril 1979 au 31 mars 1984

Répartition des coûts :

MEEER	11 100 000 \$
Gouvernement provincial	7 400 000
Coût estimatif total	18 500 000 \$

Dépenses du MEEER à ce jour 3 780 000 \$

Dépenses du MEEER en 1982-1983 820 000 \$

Cette entente a pour objet d'accélérer l'augmentation de la production des cultures à forte valeur ajoutée et la conversion des cultures en élevage du bétail à viande rouge. Pour arriver à ces fins, on doit stimuler la production des cultures industrielles en améliorant l'efficacité de la production fourragère et l'alimentation du bétail et en adoptant des mesures pour supprimer les obstacles qui limitent la production des cultures à forte valeur ajoutée.

Les dépenses du MEEER pour l'année 1982-1983 ont pris fin le 13 octobre 1982, date à laquelle l'entente a été transférée à Agriculture Canada.

Le développement touristique

Durée : 1^{er} avril 1979 au 31 mars 1984

Répartition des coûts :

MEEER	12 000 000 \$
Gouvernement provincial	8 000 000
Coût estimatif total	20 000 000 \$

Dépenses du MEEER à ce jour 1 814 825 \$

Dépenses du MEEER en 1982-1983 479 717 \$

L'objectif global de cette entente est de relever les endroits touristiques de la province et d'améliorer la productivité de l'industrie touristique, grâce à l'action conjointe de l'industrie et du gouvernement.

L'aménagement hydraulique aux fins d'expansion économique régionale et de lutte contre la sécheresse

Durée : 30 mai 1980 au 31 mars 1984

Répartition des coûts :

MEEER (ARAP)	5 350 000 \$
Gouvernement provincial	3 600 000
Coût estimatif total	8 950 000 \$

Dépenses du MEEER à ce jour 3 450 000 \$

Dépenses du MEEER en 1982-1983 1 688 000 \$

Le Bureau des affaires du Manitoba de l'ARAP est chargé de veiller aux intérêts fédéraux dans l'administration de cette entente qui prévoit la réalisation d'études visant à évaluer les effets de la sécheresse sur le développement présent et futur portant sur des travaux précis d'approvisionnement en eau. L'ARAP et le département d'économie agricole de l'Université du Manitoba effectuent actuellement, aux termes d'un contrat, des études sur la vulnérabilité à la sécheresse.

On a poursuivi les études des nappes d'eau souterraines. Des entrepreneurs privés et le personnel de l'ARAP munis de matériel de forage ont effectué des forages exploratoires et des essais de puits.

On a entamé des études de la région Assiniboine-South-Hespeier. Deux projets d'inversement de la rivière Assiniboine vers le bassin de la rivière La Salle pour fournir de l'eau aux agriculteurs et augmenter en eau le reste de la région Assiniboine-South-Hespeier, grâce à un important système d'emmagasinement d'eau et de dérivation de la rivière Assiniboine. On croit que ces déviations offriront des possibilités considérables en matière d'irrigation dans la région.

De plus, au cours de 1982-1983, on a approuvé la construction de 29 bouches d'égout municipales dans le cadre de la présente entente.

Le développement rural du Nord

Durée : 2 mars 1981 au 31 mars 1984
Répartition des coûts :

MEER	9 250 000 \$
Attaires Indiennes et du Nord	750 000
Gouvernement provincial	8 500 000
Cout estimatif total	18 500 000 \$

Dépenses du MEER à ce jour 2 114 000 \$
Dépenses du MEER en 1982-1983 1 984 000 \$

L'expansion et la diversification de l'assise économique, dans la région rurale du nord de l'Ontario, constituent l'objectif de la présente entente. Pour l'atteindre, on encouragera les entreprises locales et de petite envergure qui représentent un élément essentiel au développement à long terme du Nord. Une aide financière est offerte pour toute une gamme d'activités économiques reliées aux domaines de l'agriculture, des ressources naturelles, du tourisme et de l'expansion des petites entreprises.

A la fin de mars 1983, 357 projets avaient été approuvés, représentant un engagement fédéral total de plus de 6,8 millions de dollars.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Tout le nord de l'Ontario, y compris les districts de Parry Sound et de Nipissing, ainsi que la région de Renfrew-Pembroke dans l'est de la province, sont admissibles à des subventions en vertu de la Loi sur les subventions au développement régional.

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	28
Prévision du nombre d'emplois créés	278
Investissements au titre de l'actif admissible	11 892 000 \$
afférents à ces offres	
Engagements du MEER au chapitre de ces offres	2 761 000 \$
Total des versements en 1982-1983	6 320 000 \$

LE MANITOBA

Au 31 mars 1983, neuf ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de développement (ECD). On trouvera, dans les pages suivantes, une brève description des activités entreprises dans le cadre des ententes auxiliaires et des autres programmes en 1982-1983.

LES ENTENTES AUXILIAIRES

L'entente sur le développement du Nord

Durée : 29 novembre 1982 au 31 mars 1987
Répartition des coûts :

MEER	62 800 000 \$
Emploi et Immigration	40 000 000
Attaires Indiennes et du Nord	22 200 000
Gouvernement provincial	61 200 000
Cout estimatif total	186 200 000 \$
Dépenses du MEER à ce jour	1 597 000 \$
Dépenses du MEER en 1982-1983	1 597 000 \$

Les objectifs de cette entente sont d'exploiter les possibilités locales d'emploi et de revenus dans les agglomérations isolées du Nord, ainsi que d'accroître la participation de la main-d'œuvre du Nord particulièrement dans les principales secteurs des ressources, en levant les obstacles au développement économique et humain. Les programmes découlant de cette entente sont axés sur le développement économique communautaire, l'épanouissement humain et l'aménagement communautaire. L'entente vise à faire en sorte que les résidents locaux puissent tirer parti des éventuels développements économiques communautaires dans le nord du Manitoba. La coordination entre les parties à l'entente a pour but de faciliter les mesures de préparation à l'emploi, l'identification des débouchés et le placement des travailleurs qualifiés dans une vaste gamme de postes reliés à l'exploitation des ressources et aux secteurs techniques professionnels et des services.

aide en vue de mettre sur pied une agence de développement économique pour l'ensemble du comté. En vertu des modifications apportées ultérieurement à cette entente, on met sur pied un programme de repeuplement des forêts dans l'est de l'Ontario, ainsi qu'un programme de levés géoscientifiques dans la région de Kirkland Lake.

Dans le cadre du programme sur la région de la vallée supérieure de l'Outaouais, l'association de développement économique du comté a pris part à de nombreuses initiatives économiques locales. La tenue d'une étude des possibilités manufacturières visant à aider la région à raffermir son assise économique pour l'avenir a suscité un intérêt local particulier. Les constatations du projet d'études de l'aménagement de terrains industriels ont suscité des discussions fédérales-provinciales au sujet de la nécessité d'une zone industrielle à Pembroke. Une modification visant à inclure dans cette entente un programme portant sur la zone industrielle de Pembroke a été signée en avril 1982. Une contribution fédérale de 8 millions de dollars a été accordée à cette fin.

Dans le cadre du programme des nouvelles forêts de l'est de l'Ontario, les travaux en cours pour la réalisation de cinq projets importants se déroulent normalement. Parmi ces projets, on compte l'exploitation des peupliers hybrides, le repeuplement des forêts de feuillus et les inventaires des ressources forestières et agricoles.

Grâce à l'étude géophysique effectuée en vol et aux cartes de données établies par la suite dans le cadre du programme de Kirkland Lake, les travaux considérables d'exploration minière se sont poursuivis au cours de l'année à l'étude dans les régions de Swastika, Kirkland Lake, Virginitown et Larker Lake.

La modernisation de l'industrie des pâtes et papiers

Durée : 15 mai 1979 au 31 mars 1984
Répartition des coûts :

MEER	60 000 000 \$
Gouvernement provincial	120 000 000
Coût estimatif total	180 000 000 \$

Dépenses du MEER à ce jour 51 609 000 \$
Dépenses du MEER en 1982-1983 9 891 000 \$

Destinée à stimuler les investissements du secteur privé dans l'industrie des pâtes et papiers de la province par le biais de subventions au titre de la modernisation des usines, de la conservation de l'énergie et de l'adoption de mesures contre la pollution, cette entente vise à tirer parti des

L'est de l'Ontario

A la fin de l'année à l'étude, les dépenses effectuées par les entreprises s'élevaient à plus de 1,2 milliard de dollars.

Le programme va bon train et satisfait à ses objectifs. On s'attend que la contribution maximale du MEER, évaluée à 60 millions de dollars, incitera fortement les entreprises du secteur privé à investir quelque 2 milliards de dollars pendant la durée de l'entente.

Neuf sociétés importantes de pâtes et papiers ont signé des ententes pour recevoir une aide en vertu de ce programme.

possibilités actuelles pour renforcer l'industrie ontarienne des pâtes et papiers en l'encourageant à investir les sommes nécessaires pour satisfaire aux exigences de l'environnement et pour améliorer sa position concurrentielle sur les marchés internationaux.

Néanmoins, les dépenses effectuées par les entreprises s'élevaient à plus de 1,2 milliard de dollars.

Durée : 20 décembre 1979 au 31 mars 1984
Répartition des coûts :

MEER	25 175 000 \$
Gouvernement provincial	25 175 000
Coût estimatif total	50 350 000 \$

Dépenses du MEER à ce jour 17 436 000 \$
Dépenses du MEER en 1982-1983 5 018 000 \$

Cette entente a pour objectif d'aider à stabiliser, à diversifier et à élargir l'assise économique de la région rurale de l'est de l'Ontario en exploitant la base de ressources naturelles et en assurant sa viabilité à long terme, et en stimulant les investissements du secteur privé dans la région. De l'aide a été accordée au chapitre de l'agriculture, des forêts, des minéraux, du tourisme et des subventions aux petites entreprises.

Quelque 3,2 millions de dollars en prêts-subventions ont été offerts à 51 entreprises au cours de l'année 1982-1983 à la suite de quoi le secteur privé a investi la somme de 11,7 millions de dollars, suscitant ainsi la possibilité de créer en moyenne 667 emplois à temps plein.

Les travaux de repeuplement des forêts ont continué à fournir des emplois à temps partiel aux résidents locaux pendant l'hiver. La technologie de levés par gradiomètre a été transférée du gouvernement au secteur privé en vue de stimuler l'exploration minière par des levés aériens du potentiel minéral qui existe dans l'est de l'Ontario.

LES ENTENTES AUXILIAIRES

Le nord-est de l'Ontario

Durée : 25 mars 1976 au 31 mars 1983
Répartition des coûts :

MEER	13 799 000 \$
Société canadienne	
d'hypothèques et de logement	1 497 000
Gouvernement provincial	15 295 000 \$
Cout estimatif total	30 591 000 \$

Dépenses du MEER à ce jour 11 634 000 \$
Dépenses du MEER en 1982-1983 1 362 000 \$

En vertu de cette entente, les mesures nécessaires sont prises en vue de renforcer le tissu urbain du nord-est de l'Ontario en atténuant les obstacles au développement qui existent dans certaines zones urbaines clés et en y concentrant la nouvelle activité économique. À l'heure actuelle, des programmes ont été élaborés, dans le cadre de cette entente, pour les villes de Parry Sound, Timmins, Sudbury, North Bay et Valley East.

Au cours de l'année à l'étude, les réseaux de distribution d'eau et d'égout ont été raccordés au réseau municipal déjà en place à Valley East. De même, on a apporté les dernières modifications aux pompes des égouts, et des raccordements aux canalisations municipales actuelles ont été effectués aux termes du programme auxiliaire des égouts sanitaires du programme pour la zone de Sudbury.

Dans le cadre du programme pour la région de North Bay, on a achevé, en 1982-1983, les dernières vérifications des réseaux d'adduction d'eau et d'égout, les autres travaux souterrains le long de la promenade Lakeshore, ainsi que la station de pompage, le dispositif de dérivation, le revêtement en dur et les travaux des égouts d'inverse. Les projets d'accès aux routes et d'irrigation en cas de tempête se poursuivent.

Les régions de Parry Sound et de Timmins ont bénéficié de programmes de développement au cours d'exercices financiers précédents.

Les localités à industrie unique

Durée : 18 octobre 1976 au 31 mars 1984
Répartition des coûts :

MEER	9 383 630 \$
Affaires indiennes et du Nord	314 908
Ministère des Transports	150 000
Société canadienne	366 462
d'hypothèques et de logement	9 585 000
Gouvernement provincial	19 800 000 \$
Cout estimatif total	30 591 000 \$

Dépenses du MEER à ce jour 8 425 000 \$
Dépenses du MEER en 1982-1983 281 000 \$

Cette entente a pour objectifs de diversifier et de stabiliser l'économie des localités à industrie unique du nord de l'Ontario et d'entreprendre des programmes visant à atténuer les problèmes sociaux et économiques qui caractérisent les localités à industrie unique.

Les projets entrepris aux termes de cette entente vont bientôt prendre fin. En mars 1983, on modifiera l'entente afin d'y inclure la prolongation des réseaux d'adduction d'eau et d'égout de la ville de Longlac à la réserve indienne n° 58. Ce projet a été financé à même les fonds réservés dans le cadre de l'entente actuelle, pour certaines éventualités.

L'entente a également été prorogée jusqu'au 31 mars 1984.

La mise en valeur des ressources communautaires et rurales

Durée : 7 décembre 1977 au 31 mars 1985
Répartition des coûts :

MEER	12 728 000 \$
Gouvernement provincial	15 828 000
Cout estimatif total	28 556 000 \$

Dépenses du MEER à ce jour 4 397 000 \$
Dépenses du MEER en 1982-1983 656 000 \$

La première étape de l'entente, soit le programme de la vallée supérieure de l'Outaouais, vise à accroître les possibilités d'emploi et les revenus dans les industries de ressources et de fabrication du comté de Renfrew. Parmi les éléments du programme, on compte l'évaluation des ressources forestières et minérales, des études sur l'aménagement de terrains industriels et un

Nombre net d'offres acceptées	Prévision du nombre d'emplois	crées	investissements au titre de l'actif admissible	afférents à ces offres	Engagements du MEER au chapitre de ces offres	12 535 000 \$	au cours de l'exercice financier 1982-1983, les dépenses du MEER au Québec, en vertu des programmes de subventions au développement régional, se sont élevées à 86,6 millions de dollars, dont 45,5 millions ont été versés dans le cadre du programme de la zone spéciale de contrôle.
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LE PROGRAMME DE DÉVELOPPEMENT ÉCONOMIQUE DES ÎLES-DE-LA-MADELEINE

En comparaison avec les autres régions du Québec, les Îles-de-la-Madeleine n'ont pas atteint un niveau de développement économique permettant de réduire le chômage chronique qui y sévit. La délabresse de la croissance économique est en partie attribuable à la situation géographique de cette région. Conséquent de ce problème, l'ancien ministre de l'Expansion économique régionale, de concert avec d'autres ministères fédéraux, a mis en oeuvre un programme qui vise essentiellement l'amélioration des conditions de vie de la population des Îles, ainsi que la création et le maintien d'emplois permanents en vue de réduire le taux de chômage et l'exode de la population.

Le programme initial représentait un engagement de 13,7 millions de dollars auquel s'est ajouté, au cours du présent exercice financier, une somme de 5,6 millions. Le programme est divisé en sept volets dont trois sont laissés à la maîtrise d'oeuvre des ministères des Pêches et des Océans, des Transports et de l'Agriculture. Les quatre autres volets tombent sous la responsabilité du MEER et prévoient de l'aide financière à des entreprises manufacturières ou touristiques, à des initiatives de développement économique et à des études économiques.

Le programme de stimulants industriels a donné lieu, au cours de l'exercice financier 1982-1983, aux activités suivantes :

Nombre net d'offres acceptées	Prévision du nombre d'emplois	crées	investissements au titre de l'actif admissible	afférents à ces offres	Engagements du MEER au chapitre de ces offres	458 000 \$	Total des versements en 1982-1983	511 000 \$
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L'ONTARIO

Au 31 mars 1983, 11 ententes auxiliaires avaient été conclues avec l'Ontario en vertu de l'entente-cadre de développement (ECD). Sept ententes sont actuellement en vigueur, six étant administrées par le MEER et une par le Service canadien des forêts (SCF) d'Environnement Canada. Depuis le 30 septembre 1982, l'entente sur la gestion des forêts relève du SCF. Au cours de l'exercice financier 1982-1983, aucune dépense n'a été effectuée par le MEER aux termes de cette entente.

Au cours de l'année à l'étude, les dépenses effectuées par le MEER dans la région de l'Ontario se sont élevées à 29 millions de dollars, dont 19,2 millions ont été consacrés aux activités entreprises dans le cadre des ententes auxiliaires et 6,3 millions de dollars aux stimulants industriels.

Plus de 270 nouveaux emplois et des investissements en capital de près de 12 millions de dollars sont censés découler des activités entreprises en 1982-1983 dans le cadre du programme de subventions au développement régional. Vingt-huit offres d'aide ont été acceptées au cours de l'année. Cette aide est offerte aux entreprises qui se lancent dans des projets de fabrication ou de transformation ou à celles qui agrandissent ou modernisent leurs usines situées dans les régions désignées de l'Ontario.

On trouvera dans les pages qui suivent une brève description des activités entreprises dans le cadre des ententes auxiliaires et du programme de subventions au développement régional.

Dans le cadre de cette entente, les deux gouvernements ont contribué à l'implantation de l'usine de papier journal de la société Donohue-Norwick à Amos, ainsi qu'à la mise en place, par les administrations municipales d'Amos et d'Amos-Est, de l'infrastructure domiciliaire requise du fait de l'accroissement de la population occasionné par l'implantation de cette usine.

La construction de l'usine, d'une capacité annuelle de 160 000 tonnes métriques, a été amorcée à l'automne 1980 et terminée au printemps 1982. La mise en exploitation commerciale de l'usine a donc été effectuée selon le calendrier prévu, soit en mars 1982, vingt mois seulement après le début des travaux de construction. De plus, l'import de soulagner que, malgré la conjoncture économique particulièrement difficile et les taux d'intérêts élevés, ce projet a été réalisé à l'intérieur du coût global prévu de 190 millions de dollars. Enfin, l'implantation de l'usine de papier journal d'Amos, où l'on utilise de la pâte fabriquée à 100 % à partir du procédé thermomécanique, a permis la création de 700 emplois directs et indirects.

À Amos, les travaux d'infrastructure domiciliaire permettant de desservir près de 200 unités de logement ont été réalisés, à l'exception de ceux relatifs au bitumage des chaussées.

La Société Inter-Port de Québec

Durée : 3 juillet 1981 au 31 mars 1984
Répartition des coûts :

MEER	5 550 000 \$
Gouvernement provincial	3 700 000 \$
Coût estimatif total	9 250 000 \$
Depenses du MEER à ce jour	1 502 000 \$
Depenses du MEER en 1982-1983	1 187 000 \$

La Société Inter-Port (SIP) est une société qui s'occupe de la promotion et du développement industriel dans la région de Québec en mettant l'accent sur les projets susceptibles de bénéficier des infrastructures portuaires. La SIP est détenue à raison de 60 % par le gouvernement québécois et à 40 % par le gouvernement canadien. Cependant, la participation du gouvernement fédéral aux investissements s'élève à 60 % aux termes d'une entente fédérale-provinciale, tandis que celle du gouvernement provincial est de 40 %.

Les objectifs poursuivis par la SIP consistent essentiellement à diversifier et à renforcer la structure économique de l'agglomération de Québec

LES PROGRAMMES DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Au cours de cette période, les travaux de la SIP ont permis de contribuer à la mise sur pied d'un Consortium d'exportation de bois de l'est du Canada (CEBEC). Cette première réussite découle du travail intensif d'Inter-Port auprès des industriels de la région afin de susciter l'émergence d'un regroupement et la création de nouveaux consortiums : services d'achat, de mise en marché et d'expédition en commun pour les industries de certains secteurs cibles. De plus, dans le cadre de son mandat visant à assurer une meilleure concertation des agents du milieu, la SIP fut à l'origine de la création d'un comité de coordination regroupant dix organismes de développement économique de la région.

et à favoriser la création d'emplois. Elle appuie le secteur privé et stimule l'investissement ayant un impact sur l'économie régionale. Au cours de 1982-1983, la SIP a poursuivi à rythme accéléré le processus d'acquisition de terres à Pointe-de-la-Martinnière. Il importe de souligner que la SIP a procédé au règlement de 2 dossiers d'expropriation, soit 65 % de 52 propriétés à acquérir.

La Loi sur les subventions au développement régional	
Au cours de l'exercice financier 1982-1983, la Loi sur les subventions au développement régional a donné lieu aux activités suivantes :	
Nombre net d'offres acceptées	137
Prévision du nombre d'emplois créés	875
Investissements au titre de l'actif admissible	71 483 000 \$
Engagements du MEER au chapitre de ces offres	16 171 000 \$
La zone spéciale de Montréal	

Ce programme a pour but d'accélérer le développement de la structure industrielle de la région de Québec, en renforçant le rôle de la région montréalaise en tant que centre de l'expansion manufacturière de la province.

Au cours de l'année à l'étude, ce programme a donné lieu aux activités suivantes :

Il en coûtera 10 millions de dollars pour rendre l'usine tout entière conforme aux normes fédérales-provinciales en matière d'écologie.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	18
Prévision du nombre d'emplois créés	536
Investissements au titre de l'actif admissible	
afférents à ces offres	30 183 000 \$
Engagements du MEER au chapitre de ces offres	7 996 000 \$
Total des versements en 1982-1983	10 035 234 \$

LE QUÉBEC

Les dépenses du MEER au Québec se sont élevées à 127,8 millions de dollars en 1982-1983. De ce montant, 30,2 millions de dollars ont été utilisés dans le cadre des ententes auxiliaires intervenues entre le Canada et le Québec, tandis que plus de 87 millions ont été dépensés sous forme de subventions et de contributions à des entreprises manufacturières.

Au 31 mars 1983, dix ententes auxiliaires étaient en vigueur en vertu de l'entente-cadre de développement (ECD). On trouvera dans les pages suivantes une brève description des activités entreprises dans le cadre des ententes auxiliaires qui sont demeurrées sous la responsabilité du MEER et des autres programmes au cours de 1982-1983.

Le programme de développement économique des Îles-de-la-Madeleine, annoncé en 1980-1981, a continué de progresser au cours de 1982-1983. Parmi les projets mis de l'avant, on compte un programme de subventions mieux adapté aux besoins particuliers des petites et moyennes entreprises de la région.

En ce qui concerne les programmes de subventions aux entreprises manufacturières incluant le programme d'aide à l'entreprise des Îles-de-la-Madeleine, 227 entreprises manufacturières québécoises ont reçu une offre d'aide financière, ce qui devrait susciter des investissements de

L'ordre de 150,6 millions de dollars et amener la création de 2 176 emplois. L'appui financier du MEER à toutes ces entreprises industrielles représente des engagements totalisant 29,1 millions de dollars en 1982-1983.

En outre, le 13 septembre 1982, le ministre a annoncé un programme d'aide aux infrastructures nautiques dans le cadre des événements reliés au Québec 1984-1984. Ce programme vise à apporter une aide financière au développement et à l'expansion de ports de refuge le long de Saint-Laurent. Onze sites ont été identifiés d'un façon prioritaire. Le coût total du programme est de 9 millions de dollars bien qu'aucune dépense n'ait été faite en 1982-1983.

LES ENTENTES AUXILIAIRES

Les infrastructures industrielles

Durée : 26 mars 1975 au 31 mars 1984	Répartition des coûts :
MEER	82 602 000 \$
Gouvernement provincial	55 068 000 \$
Coût estimatif total	137 670 000 \$
Dépenses du MEER à ce jour	54 614 000 \$
Dépenses du MEER en 1982-1983	5 903 000 \$

La présente entente consiste en un programme d'aide financière destiné aux municipalités désireuses d'améliorer ou d'élargir leur infrastructure industrielle. Cette aide favorise la création et l'expansion de zones industrielles, ainsi que l'établissement de parcs bien équipés dans le domaine de la pêche industrielle en Gaspésie et sur la Côte-Nord. Les municipalités qui ne disposent pas d'infrastructure nécessaire à l'implantation d'une entreprise industrielle peuvent aussi bénéficier d'une aide aux termes de l'entente.

En 1982-1983, la réalisation des divers projets inscrits à l'entente s'est déroulée telle qu'on le prévoit, à l'exception des interventions portant sur le secteur de la pêche. Dans ce dernier cas, face à la réorientation des politiques et des programmes du gouvernement provincial, on a dû reporter à une autre année la mise en oeuvre de projets importants.

Au cours de l'année, les dépenses du MEER au chapitre de l'aménagement des zones industrielles se sont élevées à 2 640 000 \$, celles au titre des parcs de pêche se sont limitées à 11 800 \$, alors que d'autres interventions ponctuelles ont nécessité des fonds totalisant 3 250 500 \$.

Les pâtes et papiers

Durée : 27 août 1980 au 31 mars 1984

Répartition des coûts :

MEER	33 800 000 \$
Gouvernement provincial	8 450 000
Cout estimatif total	<u>42 250 000 \$</u>

Depenses du MEER à ce jour	23 740 966 \$
Depenses du MEER en 1982-1983	6 288 122 \$

Elaborée par le biais d'un exercice de planification fédéral-provincial dans lequel le MEER et le ministère de l'Industrie et du Commerce représentaient le gouvernement fédéral, cette entente reconnaît que l'industrie des pâtes et papiers du Nouveau-Brunswick doit faire l'objet de vastes programmes de modernisation et de réduction des coûts, particulièrement dans le cas des vieilles usines situées dans le nord de la province.

Sept des usines de la province ont présenté une demande d'aide dans le cadre de cette entente, ce qui pourrait entraîner un investissement total de plus de 500 millions de dollars, si chacune de ces usines réclame les 42,25 millions auxquels elle a droit. Quatre usines ont à ce jour conclu des ententes avec les gouvernements fédéral et provincial.

L'usine de pâtes Boise Cascade Canada Itée, de Newcastle, recevra une subvention de 4 millions de dollars à des fins de modernisation. Cette société investira 41 millions de dollars pour l'amélioration de l'outillage dans les domaines de la modernisation des procédés, de la lutte contre la pollution et de l'économie de l'énergie.

Une somme de 12,5 millions de dollars sera versée à la NBIP Limited pour la modernisation de son usine de papier journal à Dalhousie. Le projet de modernisation de la société coûtera au total 160,4 millions de dollars.

La St. Anne Nackawic Pulp and Paper Ltd. recevra, pour sa part, 5 millions de dollars pour la modernisation de son usine de pâtes, dans le cadre d'un projet de 62,2 millions de dollars.

Dix-sept millions de dollars seront octroyés à la Fraser Incorporated d'Edmundston pour l'aider à moderniser son usine d'athouville. Le programme à trois volets, d'une valeur de 169 millions de dollars, englobe la modernisation de l'outillage, la lutte contre la pollution et l'adoption de mesures efficaces d'économie de l'énergie.

L'aménagement du Market Square à Saint-Jean

Durée : 14 octobre 1980 au 31 mars 1983

Répartition des coûts :

MEER	8 085 800 \$
Gouvernement provincial	2 021 500
Cout estimatif total	<u>10 107 300 \$</u>

Depenses du MEER à ce jour	2 887 748 \$
Depenses du MEER en 1982-1983	800 910 \$

L'objet de la présente entente était d'entreprendre la réalisation d'un projet de développement qui comprend l'aménagement d'une partie du centre ville de Saint-Jean. L'entente prévoitait des contributions au titre de la construction du palais du commerce et des éléments de l'hôtel du complexe de l'édifice central. La construction du palais du commerce a été terminée en 1982-1983.

Depuis le 1^{er} septembre 1982, cette entente auxiliaire relève de Travaux publics Canada.

La modernisation de l'usine de la Consolidated-Bathurst, Inc. à Bathurst (Nouveau-Brunswick)

Durée : 30 mars 1982 au 31 mars 1989

Répartition des coûts :

Consolidated-Bathurst	175 000 000
Gouvernement provincial	4 900 000
Cout estimatif total	<u>199 500 000 \$</u>

Depenses du MEER à ce jour	9 894 055 \$
Depenses du MEER en 1982-1983	8 774 055 \$

Cette entente a pour but de permettre aux gouvernements fédéral et provincial et à la Consolidated-Bathurst de mettre en oeuvre un programme d'investissement et, par là, de maintenir les possibilités d'emploi et de favoriser l'essor industriel et commercial de la région.

L'entente servira de catalyseur, puisque la Consolidated-Bathurst investira 175 millions de dollars au titre de la modernisation. Dans le cadre du plan de modernisation, l'atelier de pâte kraft de l'usine de Bathurst fermera ses portes. A sa place, la compagnie construira dans cette ville, au coût de 98 millions de dollars, une usine de pâte thermomécanique de 400 tonnes par jour. Celle-ci entrera en exploitation en 1983.

De 1981 à 1987, la somme de 7 millions de dollars sera consacrée à la réfection de l'usine de fabrication de carton à onduler. Une somme additionnelle de 60 millions de dollars servira à l'acquisition d'une nouvelle machine à onduler qui sera mise en exploitation en 1988.

Au cours de l'année à l'étude, un montant de 1 631 000 \$ a été consacré à l'achat de matériel de CFAO destiné au Collège communautaire de Bathurst. Grâce à ce matériel, le collège sera dorénavant relié aux centres de technologie de l'industrie manufacturière de la province et permettra aux gens d'affaires d'avoir recours à cette nouvelle technologie.

Un montant de 1,4 million de dollars a été accordé pour la réalisation de projets touristiques dans la région de Restigouche. On effectuera des travaux d'amélioration à la glissière d'été et au terrain de camping des parcs Sugarloaf et Eel River, et le grand public pourra bénéficier de ces installations au cours de l'été de 1984.

Deux centres de services maritimes à Bas-Caraquet et à Shipigan ont également reçu une subvention de 4,9 millions de dollars. Au printemps de 1984, lorsque ces projets seront terminés, les pêcheurs pourront remorquer beaucoup plus rapidement les navires pour les radoubier et les entreposer.

La mise en valeur des ressources agricoles

Durée : 1^{er} avril 1978 au 31 mars 1983

Répartition des coûts :
MEER 27 698 000 \$
Gouvernement provincial 6 924 500 \$
Coût estimatif total 34 622 500 \$

Dépenses du MEER à ce jour 19 586 833 \$
Dépenses du MEER en 1982-1983 113 250 \$

Cette entente constituait le deuxième accord auxiliaire sur l'agriculture conclu avec le Nouveau-Brunswick. L'objectif de la présente entente consistait à maximiser la contribution du secteur agricole et des secteurs connexes à la production provinciale, aux revenus gagnés et à l'emploi. Des stratégies distinctes et des objectifs ont été établis pour les denrées suivantes : les pommes de terre, les fruits et légumes, le bétail et le fourrage. Les buts précis de l'entente étaient d'augmenter le volume et l'efficacité, d'accroître les activités de transformation et d'améliorer les méthodes de commercialisation.

Depuis le 1^{er} septembre 1982, cette entente auxiliaire relève d'Agriculture Canada.

Les régions en voie de développement

Durée : 1^{er} mai 1979 au 31 mars 1983

Répartition des coûts :
MEER 20 401 500 \$
Gouvernement provincial 5 872 500 \$
Coût estimatif total 26 274 000 \$

Dépenses du MEER à ce jour 9 979 420 \$
Dépenses du MEER en 1982-1983 3 712 338 \$

Cette entente avait pour objectif d'accélérer le développement économique et socio-économique de certaines régions de la province qui ne font pas l'objet d'autres ententes régionales. Les efforts étaient focalisés sur les centres urbains possédant un potentiel de croissance. Les programmes, qui complétaient ceux existant déjà en vertu d'ententes sectorielles en vigueur, étaient destinés à créer des emplois, des revenus et une activité économique, de même qu'à assurer le maintien.

En 1982-1983, une subvention de quelque 582 000 \$ a été versée dans le cadre d'un important projet d'attraction touristique évalué à 1,8 million de dollars, soit l'aménagement de la gorge de Grand-Sault. La subvention porte sur la construction de deux centres touristiques. Aux termes du programme municipal de mise en valeur un montant supplémentaire de 2 380 000 \$ a été accordé pour des projets d'infrastructure municipale dans les régions du Nord-Ouest et de la Miramichi.

L'exploitation forestière

Durée : 1^{er} avril 1980 au 31 mars 1984

Répartition des coûts :
MEER 30 000 000 \$
Gouvernement provincial 7 500 000 \$
Coût estimatif total 37 500 000 \$

Dépenses du MEER à ce jour 13 378 386 \$
Dépenses du MEER en 1982-1983 1 366 224 \$

Le principal objectif de cette entente est le traitement sylvicole intensif des terres forestières en vue de maintenir des réserves de bois à long terme. L'accent est mis sur les résineux en particulier.

Depuis le 1^{er} septembre 1982, cette entente auxiliaire relève du Service canadien des forêts d'Environnement Canada.

de la Nouvelle-Ecosse à conserver leur position concurrentielle et à leur permettre de respecter les normes actuelles de lutte contre la pollution. L'octroi de stimulants à trois entreprises a été approuvé et la mise en oeuvre effective conformément au calendrier.

Le développement de l'industrie océanique

Durée : 24 juillet 1981 au 24 juillet 1986

Répartition des coûts :

MEER 22 950 000 \$

Gouvernement provincial 12 050 000

Coût estimatif total 35 000 000 \$

Dépenses du MEER à ce jour 890 000 \$

Dépenses du MEER en 1982-1983 816 000 \$

Cette entente, qui est la première initiative canadienne touchant l'industrie océanique, consiste en deux groupes de programmes financés séparément par les gouvernements fédéral et provincial et mis en oeuvre conjointement en vertu de l'entente-cadre de développement. L'entente a pour but de stimuler la croissance des industries océaniques de fabrication et de services à moyenne et haute technologie et d'appuyer la recherche appliquée et le transfert de la technologie de façon que la Nouvelle-Ecosse puisse devenir un véritable "centre d'excellence" dans le secteur de l'industrie océanique.

Le programme fédéral comporte des subventions en capital et de l'aide à la commercialisation; il appuie les associations commerciales de l'industrie océanique, l'aménagement d'un mail de mise en train des industries océaniques naissantes et la mise sur pied d'un Bureau de développement de l'industrie océanique chargé de la promotion ainsi que de l'élaboration et de la coordination des programmes fédéraux. Le programme provincial, pour sa part, offre des stimulants fiscaux au niveau municipal, des subventions à l'aménagement d'un parc consacré à l'industrie océanique et à la construction d'un centre d'innovation qui produira instructions et conseils aux industries océaniques dans le domaine de la gestion commerciale.

LE PROGRAMME DE SUBVENTIONS AU DEVELOPPEMENT REGIONAL
Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées 48

crées 715

Investissements au titre

de l'actif admissible

afférents à ces offres

Engagements du MEER au

chapitre de ces offres

Total des versements en

1982-1983

9 596 000 \$

18 990 000 \$

6 876 000 \$

LE NOUVEAU-BRUNSWICK

Au 31 mars 1983, 21 ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de développement (ECD). On trouvera dans les pages suivantes une brève description des activités entreprises dans le cadre des ententes auxiliaires et des autres programmes au cours de l'année à l'étude.

LES ENTENTES AUXILIAIRES

Les grandes arêtes de Moncton et de Saint-Jean

Durée : 17 février 1975 au 31 mars 1983

Répartition des coûts :

MEER 35 840 000 \$

Gouvernement provincial 15 360 000

Coût estimatif total 51 200 000 \$

Dépenses du MEER à ce jour 33 821 111 \$

Dépenses de MEER en 1982-1983 516 800 \$

Cette entente auxiliaire avait pour but de terminer l'axe prioritaire de Saint-Jean, ainsi que la route de Shediac à Moncton, et de poursuivre les travaux de construction du boulevard Wheeler à Moncton.

Depuis le 1^{er} septembre 1982, cette entente auxiliaire relève de Transports Canada.

Le nord-est du Nouveau-Brunswick

Durée : 23 juin 1977 au 31 mars 1984

Répartition des coûts :

MEER 67 175 000 \$

Gouvernement provincial 28 325 000

Coût estimatif total 95 500 000 \$

Dépenses du MEER à ce jour 45 887 329 \$

Dépenses du MEER en 1982-1983 7 107 273 \$

Windsonor. Les travaux pour l'aménagement de tous ces parcs ont été à toutes fins utiles terminés au cours de l'année. On a également ouvert des centres industriels polyvalents à Debert et à Kentville.

La promotion du tourisme

Durée : 1^{er} avril 1977 au 31 mars 1983

Répartition des coûts :

MEER	11 000 000 \$
Gouvernement provincial	2 750 000
Coût estimatif total	<u>13 750 000 \$</u>

Dépenses du MEER à ce jour 10 736 000 \$

Dépenses du MEER en 1982-1983 1 168 000 \$

Cette entente avait pour objet de créer de nouvelles possibilités d'emploi et d'accroître les revenus par le développement accru de l'industrie touristique. L'entente comportait deux programmes. Le premier englobait diverses activités à l'échelle provinciale dans le but de promouvoir le tourisme en Nouvelle-Écosse, d'augmenter l'efficacité de l'industrie touristique et de lui faire prendre de l'expansion là où c'était possible et souhaitable, et de prolonger la saison touristique. Le deuxième programme portait directement sur l'aménagement d'endroits choisis de destination. Au nombre des travaux, on comptait la construction ou l'agrandissement des principaux centres d'intérêt, la présentation d'attractions se prêtant à des excursions d'une journée, la coordination de la planification, la promotion et la réalisation des initiatives aux endrois de destination.

La cale sèche Panamax de Halifax

Durée : 22 janvier 1980 au 31 mars 1985

Répartition des coûts :

MEER	43 900 000 \$
Gouvernement provincial	13 700 000
Coût estimatif total	<u>57 600 000 \$</u>

Dépenses du MEER à ce jour 43 241 000 \$

Dépenses du MEER en 1982-1983 7 942 000 \$

Cette entente fait appel à une participation conjointe à un programme visant à doter le port de Halifax d'une infrastructure maritime essentielle, particulièrement une cale sèche flottante de type Panamax, un quai de mouillage, des services d'entretien et l'outillage auxiliaire requis pour la réparation des navires et la fabrication des métaux. La construction de la cale sèche flottante et des infrastructures connexes est presque terminée. La mise en service de la cale sèche devrait avoir lieu à la fin de 1983.

L'aide à la société de pneus Michelin (Canada) limitée

Durée : 7 juin 1980 au 31 décembre 1990

Répartition des coûts :

MEER	42 000 000 \$
Gouvernement provincial	14 000 000
Coût estimatif total	<u>56 000 000 \$</u>

Dépenses du MEER à ce jour Néant

Dépenses du MEER en 1982-1983

Cette entente appuie les activités de l'entreprise à Granton et à Bridgewater. Elle permet également à la société d'effectuer des améliorations considérables en vue d'accroître sa production, notamment en ajoutant des installations de conception et de fabrication assistées par ordinateur dans ses deux usines d'origine, et d'implanter une nouvelle usine de fabrication de pneus à Waterville.

La modernisation des installations de la Sydney Steel Corporation

Durée : 1^{er} avril 1981 au 31 mars 1984

Répartition des coûts :

MEER	77 000 000 \$
Gouvernement provincial	19 250 000
Coût estimatif total	<u>96 250 000 \$</u>

Dépenses du MEER à ce jour 13 844 000 \$

Dépenses du MEER en 1982-1983 12 008 000 \$

Cette entente a pour objectifs d'aider la province à maintenir les niveaux d'emploi qu'exige le bon fonctionnement de l'usine et d'améliorer la situation financière de la société en mettant sur pied un programme de travaux d'équipement qui rendra l'usine apte à fonctionner efficacement.

La modernisation de l'industrie des pâtes et papiers

Durée : 23 mai 1981 au 31 mars 1984

Répartition des coûts :

MEER	17 000 000 \$
Gouvernement provincial	4 250 000
Coût estimatif total	<u>21 250 000 \$</u>

Dépenses du MEER à ce jour 2 458 000 \$

Dépenses du MEER en 1982-1983 2 458 000 \$

Les subventions qui seront octroyées en vertu de cette entente susciteront vraisemblablement des investissements de quelque 121 millions de dollars dans les travaux de modernisation d'usines, de réduction de la pollution et des coûts de l'énergie. Cette entente vise à aider les usines

Les marchés et la mise au point des produits

Le programme contribue au financement du Centre d'expansion des marchés, grâce auquel les industries de transformation et de fabrication peuvent se prévaloir des services de commercialisation dont elles ont besoin pour mieux soutenir la concurrence. En outre, ce centre favorise la mise au point de nouveaux produits et de nouvelles méthodes de vente, et aide à trouver de nouveaux créneaux pour les produits de l'île.

Le transport

On a procédé, au cours de l'année, à la construction de cinq voies de desserte carrossables en toute saison. Tous ces projets s'inscrivent dans le cadre d'un programme de construction de routes mis au point conjointement par le MEER et le gouvernement provincial.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	19
Prévision du nombre d'emplois créés	52
Investissements au titre de l'actif admissible	
afférents à ces offres	4 401 000 \$
Engagements du MEER au chapitre de ces offres	1 114 000 \$
Total des versements en 1982-1983	1 604 735 \$

LA NOUVELLE-ÉCOSSE

Au 31 mars 1983, 16 ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de développement (ECD). On trouvera, dans les pages suivantes, une description sommaire des activités entreprises dans le cadre des ententes auxiliaires et des autres programmes, au cours de 1982-1983.

LES ENTENTES AUXILIAIRES

Le développement de la zone du détroit de Canso

Durée : 31 mars 1975 au 31 mars 1984
Répartition des coûts :

MEER	22 503 400 \$
Gouvernement provincial	7 554 100
Coût estimatif total	<u>30 057 500 \$</u>
Dépenses du MEER à ce jour	20 381 000 \$
Dépenses du MEER en 1982-1983	887 000 \$

Cette entente a pour objectif de doter la zone du détroit de Canso d'une infrastructure afin de mettre en valeur son port en eaux profondes et d'autres attributs industriels. À l'heure actuelle, les efforts de développement se concentrent sur une base d'approvisionnement pour les activités gazières au large des côtes, le service offert et d'autres retombées de cette industrie et d'industries lourdes prometteuses. Des fonds alimentent une agence de promotion et de développement, l'organisme de développement de la zone du détroit de Canso.

Le développement industriel

Durée : 22 juin 1976 au 31 mars 1983
Répartition des coûts :

MEER	19 031 200 \$
Gouvernement provincial	4 757 800 \$
Coût estimatif total	<u>23 789 000 \$</u>
Dépenses du MEER à ce jour	18 864 000 \$
Dépenses du MEER en 1982-1983	245 000 \$

Cette entente auxiliaire vise à appuyer la création de nouveaux débouchés d'emploi en Nouvelle-Écosse dans les secteurs secondaire et tertiaire de l'économie, à favoriser le développement, l'expansion et l'efficacité des entreprises locales et, enfin, à élargir l'éventail des perspectives d'emploi en mettant l'accent sur les emplois à la fois plus spécialisés et plus rémunérateurs, particulièrement dans certaines localités de taille moyenne.

L'entente prévoit l'établissement de zones industrielles dans les régions où des possibilités de développement existent, soit Amherst, Bridgewater, Debert, Kentville, Stellarton et

Le programme d'aide à la petite entreprise

Le programme a pour objectifs de favoriser l'essor du secteur de la petite entreprise de l'Île-du-Prince-Édouard en participant financièrement aux projets d'investissements qui ne sont pas présentement admissibles à une aide en vertu des programmes fédéraux en vigueur et de susciter des possibilités d'emploi et de revenu au sein du secteur de la petite entreprise. Au cours de l'année, de l'aide totalisant 257 033 \$ a été offerte pour la réalisation de 25 projets.

Le programme de développement communautaire acadien

Le programme a pour objectif d'inciter les individus et les groupes francophones à lancer des projets économiques qui contribueront à l'épanouissement et au renforcement de la langue française et de la culture acadienne à l'Île-du-Prince-Édouard. Au cours de l'année, de l'aide totalisant 290 029 \$ a été offerte pour la réalisation de 33 projets.

Le programme de soutien industriel communautaire

Le programme a pour objectif d'inciter les commissions industrielles locales de l'Île-du-Prince-Édouard à promouvoir, à coordonner et à mettre en œuvre des activités de développement économique dans les localités qui relèvent de leur compétence. Au cours de l'année, de l'aide totalisant 501 103 \$ a été offerte pour la réalisation de 17 projets.

Le programme d'aide communautaire

Le programme a pour objectif d'inciter les municipalités qui ne relèvent pas présentement d'une commission industrielle locale à entreprendre des activités de développement économique. Au cours de l'année, de l'aide totalisant 139 226 \$ a été offerte pour la réalisation de 7 projets.

Le programme de développement urbain

En vertu de ce programme, on a consacré 3,1 millions à l'aménagement du secteur sud de Harbour Drive à Summerside. Ce montant couvre tous les frais des travaux de construction. Une fois terminé, Harbour Drive reliera le secteur des magasins du centre ville aux quais pour former une zone commerciale, accélérer la circulation, augmenter le nombre de places de stationnement et réinstaller en profondeur le centre ville.

LES PROGRAMMES ADOPTÉS EN VERTU DU PLAN D'ENSEMBLE DE DÉVELOPPEMENT

L'agriculture

Du 1^{er} avril 1981 au 31 mars 1984, le MEER consacrerait 41 millions de dollars à la mise en œuvre des programmes adoptés en vertu du Plan d'ensemble de développement de l'Île-du-Prince-Édouard.

En 1982-1983, dans le cadre des programmes agricoles, des efforts soutenus ont été faits en vue de renforcer les exploitations agricoles familiales et d'inciter des individus à devenir fermiers. Depuis 1969, environ 70 % des fermiers de l'île ont reçu de l'aide financière pour agrandir, moderniser, diversifier leurs installations ou en construire de nouvelles.

Au cours de l'année à l'étude, on a mis sur pied un nouveau programme de subventions pour des denrées précises afin de développer l'industrie agricole de façon plus sélective.

Le tourisme

Au cours de l'exercice, de l'aide a été accordée pour la construction d'un palais des congrès à Charlottetown et la conduite d'une étude de faisabilité en vue de l'établissement d'un institut culinaire à l'Île-du-Prince-Édouard. Au nombre des autres projets à frais partagés, citons les stimulants de voyages et le développement de l'industrie touristique. Ils ont pour objectif de promouvoir la commercialisation et l'essor du secteur du tourisme. Les coûts de ces dernières activités continueront d'être partagés, et ces dernières seront coordonnées dans le cadre des programmes mis en œuvre directement par l'Office de tourisme du Canada.

Les forêts

Les programmes mis sur pied au cours de la deuxième phase du Plan d'ensemble de développement pour améliorer la qualité et l'utilisation des forêts de la province se sont poursuivis en 1982-1983. Le programme de subventions à l'exploitation des ressources forestières a reçu l'appui total du secteur privé et permis l'approbation de 550 plans de gestion des forêts. Au cours de l'année, on a rehaussé la valeur d'environ 500 hectares de forêt avec des semis embellis.

Durée : du 23 septembre 1982 au 31 mars 1987
Coût estimatif total pour le MEER 13 000 000 \$

Dépenses du MEER à ce jour 8 497 392 \$
Dépenses du MEER en 1982-1983 8 497 392 \$

L'entente a été signée en vertu de la loi sur les zones spéciales afin de permettre au gouvernement fédéral d'aider la société Bale Verte Mines Inc. (une filiale à part entière de la Trans-Pacific Asbestos Inc.) à prendre en main la direction et l'exploitation des anciennes installations minières de Advocate Mines Limited. En outre, une contribution de 3 millions de dollars a été accordée par le gouvernement provincial.

Le 9 septembre 1981, l'Advocate Mines Limited, producteur d'amiante et ancien exploitant de la mine de Bale-Verte, annonçait son intention de fermer la mine de façon permanente le 31 décembre 1981. Il devait en résulter la perte d'environ 800 emplois. Cette mesure arrivait au moment où la Rambler Mines Limited annonçait qu'elle mettrait un terme à son exploitation minière du cuivre dans la péninsule de Bale-Verte, ce qui avait pour effet d'éliminer 200 autres emplois.

L'entente a été conçue en vue d'aider le nouvel exploitant, la Bale Verte Mines Inc., à rouvrir la mine et à reprendre environ 320 employés de l'effectif d'origine.

Le programme d'aide, qui consistait principalement en garanties de prêts, a permis à la nouvelle société d'améliorer son fonds de roulement, ce qui lui a permis de faire l'acquisition d'actifs et de commencer plus tôt ses travaux d'exploitation et d'établissement des stocks.

L'entente a eu une incidence positive sur l'économie de la péninsule de Bale-Verte et sur la province dans l'ensemble. Bien que les marchés de l'amiante aient été stagnants, l'entente a permis aux deux niveaux de gouvernement de préserver une portion des emplois réels à l'exploitation minière de l'amiante. Grâce à ses compétences en matière de commercialisation et à son expérience dans le domaine de l'exploitation, la compagnie a réussi, sans l'aide de subventions additionnelles, à établir une entreprise rentable.

L'ÎLE-DU-PRINCE-ÉDOUARD

Le 7 octobre 1981, le gouvernement fédéral annonçait l'adoption d'un ensemble de programmes de développement économique pour l'île-du-Prince-Édouard d'une valeur de 92 millions de dollars s'étendant sur une période de trois ans (du 1er avril 1981 au 31 mars 1984). Cet ensemble comprend une entente à frais partagés avec la province prévoyant l'engagement de 53 millions de dollars pour la troisième et dernière étape du Plan d'ensemble de développement de quinze ans, ainsi qu'une stratégie fédérale de développement de l'île-du-Prince-Édouard entraînant des dépenses de l'ordre de 39 millions de dollars, laquelle a pour but d'assurer la mise en œuvre coordonnée des programmes fédéraux conçus précisément pour l'île-du-Prince-Édouard.

La stratégie fédérale de développement, qui nécessite la participation de six ministères fédéraux, dont le MEER, constituera le cadre d'une participation fédérale soutenue au développement économique de l'île-du-Prince-Édouard une fois fin le Plan d'ensemble de développement aura pris fin en 1984.

Le Conseil du Trésor a mis sur pied un comité de gestion fédéral, présidé par le DEDER et composé de représentants des ministères de l'industrie et du Commerce et de l'Expansion économique régionale, de l'Agriculture, des Transports, des Pêches et des Océans, et de l'Énergie, afin de veiller à la coordination de la planification des programmes. Au cours de l'exercice financier 1982-1983, les dépenses du MEER dans le cadre du Plan d'ensemble de développement et de la stratégie fédérale de développement de l'île-du-Prince-Édouard se sont élevées au total à 13 597 599 \$ dont 3 600 324 \$ consacrés à la stratégie.

LÉS PROGRAMMES ADOPTÉS EN VERTU DE LA STRATÉGIE FÉDÉRALE DE DÉVELOPPEMENT DE L'ÎLE-DU-PRINCE-ÉDOUARD

Du 1er avril 1981 au 31 mars 1984, le MEER consacrera 10,8 millions de dollars à la mise en œuvre des programmes économiques adoptés dans le cadre de la stratégie fédérale de développement de l'île-du-Prince-Édouard.

Des études et des projets pilotes dans les secteurs du tourisme, de l'agriculture, du dressage du cadastre, des mines, des communications, de la formation et de l'éducation des pilégers sont en cours.

La modernisation des usines de pâtes et papiers

Durée : 1^{er} juin 1981 au 31 mars 1986
Répartition des coûts :

MEER 30 000 000 \$

Gouvernement provincial 3 333 000

Cout estimatif total 33 333 000 \$

Dépenses du MEER à ce jour Néant

Dépenses du MEER en 1982-1983

Dans le cadre de cette entente, les gouvernements fédéral et provincial participeront conjointement à un programme de subventions à l'intention de l'industrie des pâtes et papiers de Terre-Neuve. L'entente a pour objectif d'améliorer la viabilité, l'efficacité et la compétitivité internationale de l'industrie terre-neuvienne des pâtes et papiers en accélérant et en maximisant les investissements et en favorisant au sein du secteur privé les politiques qui concourent à la saine gestion des forêts, à la lutte contre la pollution et à la modernisation industrielle.

Les fonds sont destinés à venir en aide à l'usine de la Bowater Newfoundland Limited à Corner Brook et à celle de l'Abitibi-Price Inc. à Grand Falls.

LE PROGRAMME DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées 4

Prévision du nombre d'emplois créés 30

Investissements au titre de l'actif admissible afférents à ces offres 1 946 000 \$

Engagements du MEER au chapitre de ces offres 449 000 \$

Total des versements en 1982-1983 4 385 649 \$

LA SOCIÉTÉ DE DÉVELOPPEMENT DE TERRE-NEUVE ET DU LABRADOR

Instituée en 1972, cette société vient compléter le programme de subventions au développement

régional à titre de source de capital-risque pour l'expansion des secteurs de la fabrication et de l'exploitation des ressources de la province. C'est le MEER qui accorde les prêts à la société, le gouvernement de Terre-Neuve qui fournit le financement par actions, et les frais d'administration sont partagés également. Cette entente viendra à expiration le 31 mars 1984.

Au cours de 1982-1983, le MEER a accordé un prêt de 0,5 million de dollars à la société et consacré 268 650 \$ au chapitre des frais d'administration.

Le programme de développement des pêches canadiennes

Durée : 21 mai 1981 au 31 mars 1986

Cout estimatif total pour le MEER 13 500 000 \$

Dépenses du MEER au MPD à ce jour 945 000 \$

Dépenses du MEER au MPD en 1982-1983 945 000 \$

Il s'agit là d'un programme fédéral appliqué d'une manière coopérative par le ministère des Pêches et des Océans. Il vise à améliorer l'efficacité des prises, de la manutention et du traitement des diverses espèces de poissons sur la côte du Labrador. Les projets approuvés seront financés à 100 % lorsque les requérants seront des associations de pêcheurs ou des conseils communautaires, car ces groupes n'ont aucune source de revenu leur permettant d'obtenir les capitaux d'investissement nécessaires. Le coût des travaux d'amélioration d'installations appartenant à la province, aux sociétés de transformation du poisson et aux coopératives sera partagé entre chaque propriétaire exploitant.

Le programme comporte six éléments aux fins d'approbation des projets : la production de glace et l'entreposage du poisson, l'entreposage dans des installations frigorifiques, les halles communautaires et les installations de déchargement, les services d'utilité publique, le traitement et la manutention du poisson et l'entretien des navires. Jusqu'ici, 101 propositions de projets dans le cadre du programme ont été reçues et 47 ont été approuvées.

De plus, des systèmes de prise mécanisés ont été installés dans plusieurs localités le long de la côte; un entrepôt pour les appâts est en cours de construction à Red Bay; les travaux d'amélioration d'une usine de transformation appartenant à la ville de Rigolet sont terminés et une halle communautaire a été rénovée à West Saint Modeste.

l'entente a été transférée à Agriculture Canada en septembre 1982.

Le développement industriel

Durée : 11 juin 1979 au 31 mars 1984

Répartition des coûts :

MEER	23 985 000 \$
Gouvernement provincial	2 665 000
Coût estimatif total	<u>26 650 000 \$</u>

Dépenses du MEER à ce jour

19 111 731 \$

7 570 863 \$

Dépenses du MEER en 1982-1983

La première phase de cette entente a pour objectif de favoriser le développement industriel de la province en commençant par les régions de Corner Brook et de Stephenville, situées dans la partie ouest de Terre-Neuve, grâce à l'aménagement de l'infrastructure nécessaire au développement d'entreprises industrielles et commerciales.

Cette entente prévoit l'octroi de fonds pour l'aménagement d'un parc industriel de 30 hectares à Corner Brook, la construction d'une voie d'accès directe reliant la Transcanadienne, au sud de la ville, ainsi que la construction d'une voie d'accès qui permettra de relier directement la zone industrielle de Stephenville et le réseau routier de Port-au-Port à la Transcanadienne.

En 1982-1983, le tronçon de 10 kilomètres de la route d'accès de Corner Brook a été bitumé, et les travaux de conception préliminaire des 4,5 derniers kilomètres ont pris fin. L'aménagement de la zone industrielle s'est poursuivi et était terminé à plus de 90 % à la fin de l'année. Les conduites principales externes d'eau et d'égout sont installées. L'équipement de pompage de l'eau et de contrôle de la pression ne l'est pas encore.

Le bitumage des derniers 15 km de la route d'accès à Stephenville d'une longueur de 23 km a été terminé durant l'année, et la route a été ouverte à la circulation.

Les forêts, 1981-1986

Durée : 9 janvier 1981 au 31 mars 1986

Répartition des coûts :

MEER	46 883 700 \$
Gouvernement provincial	5 209 300
Coût estimatif total	<u>52 093 000 \$</u>

Dépenses du MEER à ce jour

7 719 693 \$

7 719 693 \$

Dépenses du MEER en 1982-1983

Néant

L'objectif de cette entente est de maintenir et, là où c'est possible, d'augmenter la contribution du secteur forestier aux économies provinciales et nationales, d'atténuer l'effet négatif qu'aura la diminution prévue des coupes annuelles permises sur les entreprises déjà établies dans la principale zone économique d'approvisionnement, ainsi que de promouvoir l'utilisation accrue des ressources forestières au sein et à l'extérieur de la principale zone économique d'approvisionnement.

Cette entente a été transférée au Service canadien des forêts le 1^{er} septembre 1982.

Le développement communautaire de la région côtière du Labrador

Durée : 29 mai 1981 au 31 mars 1987

Répartition des coûts :

MEER	33 800 000 \$
Gouvernement provincial	5 196 000
Coût estimatif total	<u>38 996 000 \$</u>

Dépenses du MEER à ce jour

13 481 823 \$

7 720 671 \$

Dépenses du MEER en 1982-1983

Cette entente comprend les éléments suivants : la reconstruction et le bitumage de la route Straths dans le sud du Labrador, ainsi que des routes reliant les localités du Sud-Est, l'aménagement de meilleurs réseaux d'approvisionnement en eau et d'installations sanitaires domestiques, la construction de nouvelles cliniques médicales et le financement d'études préliminaires concernant l'expansion de la petite industrie dans la région.

Un tronçon de 50 kilomètres de la route Straths a été reconstruit et des contrats de bitumage ont été adjugés pour la construction de routes d'accès entre les localités de Williams Harbour et de George's Cove et de Mary's Harbour à Lodge Bay. La première est presque terminée.

Des travaux de construction d'un aqueduc et d'un réseau d'égout ont commencé à L'Anse-au-Clair, à Forteau, à L'Anse-au-Loup et à Cartwright. Des spécialistes ont été chargés des travaux de design dans le cadre des projets de Mary's Harbour, de Red Bay et de West Saint Modeste. La construction de la nouvelle clinique médicale de Saint Lewis est presque terminée, tandis que celle de l'installation de Black Tickle est achevée à 30 % environ. Les bâtiments de Mary's Harbour et de Cartwright sont en cours de rénovation et les travaux de Mary's Harbour sont presque terminés.

communautaires et la planification des transports et des ports ont été entrepris.

La promotion du tourisme

Durée : 1^{er} janvier 1978 au 31 mars 1984

Répartition des coûts :

MEER	11 938 140 \$
Gouvernement provincial	1 326 460
Coût estimatif total	<u>13 264 600 \$</u>
Dépenses du MEER à ce jour	9 857 582 \$
Dépenses du MEER en 1982-1983	2 752 716 \$

Cette entente globale sur la promotion du tourisme visait à augmenter l'efficacité de la commercialisation touristique et des programmes d'information à l'intention des voyageurs, à développer les attractions touristiques et à favoriser l'expansion des centres d'hébergement pour les touristes.

Les travaux englobent la restauration des maisons historiques de Grenfell et de Bradley, la construction de cottages touristiques dans l'ouest et l'est de Terre-Neuve, la restauration des maisons, des églises et des magasins du village historique de Trinity, l'amélioration et l'agrandissement des installations de camping pour touristes, ainsi qu'un programme de stimulants financiers pour l'exploitation des hôtels et des motels.

Le développement rural

Durée : 1^{er} avril 1978 au 30 septembre 1983

Répartition des coûts :

MEER	15 122 000 \$
Gouvernement provincial	680 000
Coût estimatif total	<u>16 802 000 \$</u>
Dépenses du MEER à ce jour	12 588 579 \$
Dépenses du MEER en 1982-1983	2 793 764 \$

Cette entente poursuivait les activités déjà entreprises visant à revitaliser et à renforcer le secteur rural de la province. Au nombre des initiatives, mentionnons l'aide aux associations de développement régional constituées en sociétés afin de leur permettre de mener à bien des travaux administratifs et communautaires, l'aide aux associations d'artisanat et aux artisans, ainsi qu'aux petites entreprises rurales.

L'aide aux associations de développement régional comprend le financement à des fins purement administratives, la formation, la planification et la mise en œuvre de projets de développement communautaire locaux qui peuvent varier de la

Le développement agricole

Durée : 14 juillet 1978 au 31 mars 1983

Répartition des coûts :

MEER	12 907 170 \$
Agriculture Canada	1 800 000
Gouvernement provincial	1 634 130
Coût estimatif total	<u>16 341 300 \$</u>
Dépenses du MEER à ce jour	7 749 370 \$
Dépenses du MEER en 1982-1983	2 673 832 \$

Cette entente avait pour objet d'appuyer la croissance de l'industrie agricole de Terre-Neuve, grâce à une production accrue, à de meilleures techniques et capacités de gestion chez les exploitants agricoles, à des méthodes de commercialisation améliorées, à une exploitation efficace des terres et à des services modernes de soutien agricole.

Au chapitre du programme d'aide financière pour le développement agricole, 200 demandes ont été approuvées totalisant un engagement financier de 4,2 millions de dollars. Dans le cadre du programme de commercialisation visant à augmenter la production et la consommation des produits agricoles locaux, on a construit un immeuble moderne de commercialisation et lancé une campagne de publicité afin de sensibiliser davantage les consommateurs. Grâce à la planification de l'utilisation des terres et aux analyses de sols, on a pu définir exactement la base des terres agricoles, alors que les laboratoires d'analyse et de services vétérinaires permettront de répondre aux demandes sans cesse croissantes de l'industrie agricole. Quant à l'industrie des myrtilles, le développement s'est poursuivi grâce à la construction de routes d'accès et à des essais de croisement sur les myrtilles.

Un appui financier est offert aux petites entreprises rurales qui ne sont pas admissibles dans le cadre du programme de subventions au développement régional telles que la construction de bateaux, l'ébénisterie, la transformation du poisson et de petites fabriques. L'artisanat est subventionné grâce à une aide accordée pour la conception et l'amélioration de la production et de la commercialisation.

La première transformation du poisson à une filature de laine.

T E R R E - N E U V E

Au 31 mars 1983, 21 ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de développement (ECD). On trouvera dans les pages suivantes une description des activités entreprises dans le cadre des ententes auxiliaires et des autres programmes, au cours de l'année à l'étude.

LES ENTENTES AUXILIAIRES

Les forêts

Durée : 1^{er} juin 1973 au 31 mars 1983
Répartition des coûts :

MEER	58 178 500 \$
Gouvernement provincial	8 343 655
Coût estimatif total	66 522 155 \$
Dépenses du MEER à ce jour	55 580 110 \$
Dépenses du MEER en 1982-1983	Néant

Cette entente vise à améliorer l'efficacité de l'industrie forestière de la province et à accroître les possibilités d'emploi et de revenu dans ce secteur. Un système intégré de gestion des ressources a été conçu pour stimuler la productivité et la diversification de l'industrie forestière.

Au cours des premières années, dans le cadre de l'entente, l'agrandissement et la mise en place des installations du ministère provincial des Terres et Forêts étaient financés conjointement, de même que les salaires des employés. Les ententes ultérieures n'incluaient pas les traitements.

Une modification importante de 11,5 millions de dollars a été entreprise en 1979 afin de tirer parti des possibilités de développement et de diversification des industries forestières de Terre-Neuve par le biais d'activités destinées à améliorer la gestion des ressources. Les travaux entrepris aux termes de cette modification (programme de stimulants économiques dans le

secteur des forêts) sont terminés et portaient sur le réaménagement des emplacements, l'éclaircissage précommercia, le débâlage des bas-côtes, la cueillette des cônes, l'exploitation par câbles et la récupération du bois. Les sociétés Abitibi-Price Inc. et Bowater Newfoundland Limited ont entrepris des projets industriels comme l'amélioration des peuplements et l'éclaircissage précommercia. Pendant la saison de pointe, les travaux entrepris en vertu du programme de stimulants économiques dans le secteur des forêts fournissaient du travail à environ 420 personnes.

Cette entente a pris fin le 30 septembre 1979, sauf la partie touchant la création d'emplois qui a pris fin le 31 mars 1983. La responsabilité de la mise en oeuvre de l'entente a été transférée au Service canadien des forêts en septembre 1982.

Le Labrador

Durée : 3 décembre 1976 au 31 mars 1983
Répartition des coûts :

MEER	18 258 300 \$
Santé et Bien-être social	1 404 000
Gouvernement provincial	2 434 700
Coût estimatif total	22 097 000 \$
Dépenses du MEER à ce jour	16 900 080 \$
Dépenses du MEER en 1982-1983	318 068 \$

Les éléments de cette entente provisoire municipale et le développement économique de la région du lac Melville, la construction d'un pont à North West River, la construction d'un parc industriel pour desservir Wabush-Labrador City et l'amélioration de la qualité de l'eau, des installations sanitaires et de l'accès aux services médicaux pour les habitants de la côte.

On a construit un parc industriel de 32 hectares Wabush pour desservir l'ouest du Labrador et le nord-est du Québec; un pont a été construit à North West River pour relier les deux rives de la localité et la partie nord à Goose Bay et Churchill Falls; les rues et l'apparence des quartiers ont été améliorées à Happy Valley-Goose Bay, et on a entrepris la construction d'un bâtiment qui abritera l'école professionnelle. Une société de développement économique a été fondée pour encadrer le développement économique. On a aménagé des réseaux d'adduction d'eau et d'égout et construit des usines d'épuration dans certaines localités côtières. Des cliniques médicales ont été construites pour répondre aux besoins d'hygiène fondamentaux des habitants de trois localités côtières isolées. Des études des hardes de caribous, des études biophysiques, des plans

LES ACTIVITÉS RÉGIONALES

Outre les programmes décrits antérieurement, le personnel des ministères fusionnés a continué d'administrer les ententes auxiliaires du ministère de l'Expansion économique régionale et le programme de subventions au développement régional.

Ces activités sont regroupées par province et territoire.

le bureau est chargé avant tout de répondre aux demandes de renseignements du public, d'élaborer des politiques et de conseiller la haute direction en ce qui a trait à l'application de la loi et de ses dispositions.

LA DIRECTION DES SERVICES ADMINISTRATIFS

La direction est chargée de la sécurité et de la sûreté, des contrats et de l'administration matérielle, de la gestion des biens-fonds, des télécommunications, de l'imprimerie et de la reprographie, du service de traitement de texte, de la gestion des dossiers, de la micrographie, des services de courrier et de messenger, des services de voyage, de la bibliothèque et de la gestion des sections administratives.

LA DIRECTION DES SERVICES INFORMATIQUES

Une autre réalisation importante de la direction a été l'intégration physique des ministères de l'industrie et du Commerce et de l'expansion économique régionale au siège central, ainsi que dans les bureaux régionaux et locaux. La direction a aussi consacré beaucoup de temps à l'élaboration d'un nouveau système de " bureaux automatisés ".

La direction est chargée de la mise au point et de la tenue de systèmes informatisés, de concevoir des logiciels et d'effectuer les opérations, de gérer les données sur les sociétés, de fournir et de voir à l'utilisation de tous les ordinateurs, y compris le matériel et les réseaux de communication de données. Le ministère a consacré 7,3 millions de dollars en 1982-1983 aux achats de biens et de services auprès de sociétés du secteur privé.

La tâche prioritaire a été de suspendre les grandes réalisations dans le cadre des programmes de stimulants en attendant que soient précisées les exigences opérationnelles des nouveaux programmes.

Les autres activités ont été la mise en oeuvre d'un système de transition informatisé du personnel devant faciliter le fusionnement organisationnel et un système financier décentralisé temporaire devant être utilisé par le nouveau ministère durant l'exercice financier 1983-1984.

LA DIRECTION DE L'ÉVALUATION DES PROGRAMMES

La direction fournit des renseignements sur l'efficacité des programmes du ministère et recommande des changements appropriés. Elle a mis au point un nouveau concept pour la réalisation des évaluations, de manière à répondre aux besoins de la hiérarchie du nouveau ministère et a également collaboré à l'instauration du nouveau programme de développement industriel et régional en précisant les besoins d'évaluation futurs. De

LA DIRECTION DES MÉTHODES DE GESTION

La direction dirige des activités devant accroître la compétence et la responsabilité de gestionnaires, coordonne le plan d'action de gestion pour en améliorer les méthodes et la mise en oeuvre de tâches visant à instaurer et à maintenir de saines méthodes de gestion au sein du ministère. L'accent a été mis notamment sur des questions de réorganisation et de responsabilités ayant trait au fusionnement du MIC et du MEER, à l'élaboration d'un processus de planification intégré, à la conception de systèmes, et sur la stratégie et matière de ressources humaines.

LA DIRECTION DE LA GESTION DE L'INFORMATION

La direction est chargée de mettre en pratique des principes de gestion pour toutes les ressources du ministère affectées à l'information. Elle est également chargée de mettre en oeuvre la politique ministérielle et s'occupe de la planification connexe.

Depuis sa création, soit en janvier 1983, la Direction de la gestion de l'information a élaboré un cadre stratégique pour l'intégration de systèmes d'information destinés aux gestionnaires de manière à appuyer le nouvel ensemble de programmes du ministère. Ce cadre stratégique comprend la mise en place d'une infrastructure d'information des gestionnaires du ministère et de l'élaboration d'un ensemble de stratégies pour qu'il puisse bien s'effectuer la gestion de l'information, des données et des technologies s'attachant à l'information. L'accent est mis notamment sur la technologie de micro-ordinateurs.

LE BUREAU DIACÈS À L'INFORMATION ET LA PROTECTION DES RENSEIGNEMENTS PERSONNELS

Le bureau a été créé, car le gouvernement avait l'intention d'adopter des lois sur l'accès à l'information et sur la protection de renseignements personnels.

lesquelles il existe des statistiques à ce sujet. (Un voyage-personne se définit comme un voyage individuel effectué sur une distance minimale de 80 km).

Les Canadiens ont dépensé environ 12,4 milliards de dollars au cours de leurs voyages d'une nuit ou plus au pays en 1982, soit une augmentation de 9,7 % comparativement à 1981.

LE CONTRÔLEUR

Le Bureau du contrôleur est chargé de la conception et de la coordination du processus de planification et de contrôle engagé par les gestionnaires du ministère, des services financiers et d'information et des services de soutien à la gestion.

Les fonctions des directions relevant du contrôleur et leurs principales activités sont présentées ci-dessous.

LA DIRECTION DE LA GESTION DES RESSOURCES

La direction est chargée de fournir des avis sur les finances et la gestion en ce qui a trait à la planification, aux programmes et aux décisions budgétaires; elle consolide le plan opérationnel pluriannuel, le budget principal des dépenses et le budget supplémentaire, et exerce un contrôle sur les budgets.

Au cours de l'exercice, la direction a fourni des données consolidées sur l'utilisation des ressources du MIC-MEER et a aidé à élaborer un système intégré de rapports pour toutes les activités ministérielles. La direction a toujours été une source globale de renseignements quant à l'incidence sur les ressources des projets et des propositions de programmes.

LA DIRECTION DES OPÉRATIONS FINANCIÈRES

La direction est chargée d'élaborer et de mettre en oeuvre la politique sur les finances et les systèmes, de rendre compte des ressources financières et d'exercer un contrôle, de vérifier les projets d'aide et de fournir des conseils d'ordre financier.

Au cours de l'exercice, les fonctions du ministère de l'Expansion économique régionale et du ministère de l'Industrie et du Commerce en matière d'opérations financières ont été intégrées.

En tant que défenseur des intérêts du tourisme, la direction générale du développement du tourisme cherche également à créer un milieu propice au développement de l'industrie en procédant de façon continue à l'examen et à la critique de la législation du gouvernement fédéral en matière de tourisme. Elle participe enfin activement à la recherche et au classement des possibilités d'investissement dans le secteur du tourisme au Canada afin de stimuler la croissance de l'industrie.

LA PERSPECTIVE INDUSTRIELLE

Le tourisme international

En total, 12 727 842 visiteurs étrangers ont séjourné au Canada en 1982, soit une diminution de 1 % comparativement à 1981. Le nombre de touristes américains ayant séjourné au Canada pendant une nuit ou plus s'élève à 10 974 047, soit une baisse de 3,6 % comparativement à 1981. Le nombre de touristes en provenance d'autres pays a atteint 1 753 795 en 1982, soit une diminution de 6,3 % par rapport à l'année précédente.

En ce qui concerne le nombre de séjours au Canada effectués par les touristes venus du Japon, de l'Australie, du Brésil, du Venezuela, de la Colombie, de l'Autriche, de la Finlande et de la Norvège ait augmenté en 1982, cette hausse a été contrebalancée par la diminution du nombre de touristes en provenance de marchés d'outre-mer traditionnels comme la Grande-Bretagne, la France, la République fédérale allemande et les Pays-Bas.

Le nombre de Canadiens qui ont séjourné une nuit ou plus à l'étranger s'est établi à 11 919 074, soit une baisse de 4 % par rapport à 1981.

Le déficit du Canada au chapitre des voyages internationaux a donc augmenté de 14,9 %, passant de 1,116 milliard de dollars en 1981 à 1,282 milliard en 1982.

Le tourisme intérieur

On estime que les Canadiens ont fait en 1982 quelque 70,1 millions de personnes-voyages d'une nuit ou plus au pays, soit le plus petit total enregistré au cours des quatre années pour

fin, les planificateurs du groupe ont établi un méthodologie détaillée appelée "Processus de repérage, d'analyse et de sélection des zones de destination touristique au Canada" (Process for Identification, Analysis and Selection of Tourist Destination Areas in Canada). Fondée sur l'identification et l'évaluation progressives de facteurs touristiques clés, elle est présentée en mise en œuvre dans diverses régions du Canada.

On a en outre accordé en 1982-1983 plus de 14,5 millions de dollars de subventions en vue de la construction de palais du commerce et de congrès à Vancouver, à Edmonton, à Toronto, Montréal et à Charlottetown, ainsi qu'une subvention de 3,4 millions de dollars pour la construction du Centre des sciences de Sudbury.

Pour appuyer les activités de planification du développement du tourisme, on a poursuivi les travaux entourant la base de données nationale sur les ressources, les produits et les marchés auxquelles sera reliée au système de concordance produit-marché qui est présentement en voie de élaboration et qui devrait être entièrement en service d'ici la fin de 1983. Ce système jumèle les produits et les marchés à l'aide d'une série de cartes superposées. La carte finale retenue présente les lieux du Canada qui correspondent le mieux à un ensemble donné de particularités du marché. Le système favorisera également la planification du développement en déterminant les éléments liés aux produits et aux services sur lesquels nous pouvons influer en vue d'accroître le nombre de touristes.

La direction générale s'est également chargée de coordonner une étude stratégique nationale sur le personnel dans l'industrie du tourisme et de l'accueil. Au cours de l'exercice financier 1982-1983, la direction générale a géré des fonds de près de 2 millions de dollars destinés à la réalisation de projets liés au tourisme dans le cadre du programme d'initiatives spéciales l'emploi.

On a par ailleurs presque terminé les travaux de recherche et de développement liés à un programme de formation intitulé "Le tourisme, c'est votre affaire". Le programme vise à améliorer les capacités de gestion et de conduite des affaires dans les petites et les moyennes entreprises du secteur de l'hébergement, surtout celles qui sont situées dans les régions plus éloignées où les ressources éducatives traditionnelles sont moins accessibles. Les vidéos cassettes pourront être diffusées par les stations de radiodiffusion communautaires et éducatives, tandis que les documents imprimés seront offerts pour faciliter l'étude à la maison.

que destination touristique. On a également lancé des campagnes publicitaires de sensibilisation au tourisme au Royaume-Uni, en République fédérale allemande, en France, en Hollande, au Mexique, en Australie et au Japon.

Enfin, la portée des campagnes principales a été considérablement élargie, grâce à une étroite collaboration avec des partenaires de l'industrie, surtout avec la CP Air au Japon et en Australie. Un encart de 16 pages a été conçu en France, et la coordination des activités publicitaires a été particulièrement intensive en République fédérale allemande et en Hollande.

En outre,

- des travaux de développement des marchés ont été effectués en Amérique du Sud, en Asie du Sud-Est et en Europe méridionale;
- des publications à grande diffusion et des brochures spécialisées ont été produites en huit langues, et quelque 8 millions d'articles publicitaires ont été distribués;
- près de 200 séminaires de promotion au Canada, aux États-Unis et à l'étranger ont été parrainés;
- environ 400 représentants des média canadiens et étrangers ont eu l'occasion de parcourir un circuit fortaire au Canada;

- 100 articles touristiques destinés à être publiés au Canada et aux États-Unis ont été rédigés. Au total, ces articles ont paru dans 164 publications différentes, représentant un tirage de 35 millions d'exemplaires.

LA DIRECTION GÉNÉRALE DU DÉVELOPPEMENT DU TOURISME

La Direction générale du développement du tourisme est chargée de fournir une compétence de nature sectorielle et un cadre de planification en vue d'appuyer le développement de l'industrie touristique. En collaboration avec les bureaux régionaux du ministère, la direction générale coordonne la planification et les programmes en fonction des problèmes de développement qui se posent à l'échelle nationale et internationale, de façon à assurer la croissance équilibrée de l'industrie touristique dans tout le Canada.

L'un des éléments clés de la stratégie de la direction générale visant à maximiser les retombées économiques nettes tirées du développement du tourisme s'appuie sur le principe des zones de destination touristique. À cette

Les Services à la gestion
Le Marketing
Le Développement du tourisme

A DIRECTION GÉNÉRALE DES SERVICES A LA GESTION

La direction générale assure une aide soutenue à la recherche, en faisant effectuer des études de l'offre, de la demande, de la rentabilité et de l'incidence du tourisme. Elle établit une base de données touristiques régionales; planifie, élabore et recommande des politiques; surveille les activités des programmes; et fait fonction, par l'entremise du Secrétariat de la coordination, de point central en ce qui concerne les relations avec le gouvernement et l'industrie.

La Direction de la politique globale et de la planification de la stratégie a donné avis et conseils sur une vaste gamme de questions de politique au cours de l'année financière. La Direction a accordé la priorité à la fiscalité dans son programme de travail et a fait enquête, en collaboration avec l'Association de l'industrie touristique du Canada, sur la perception qu'ont les entreprises touristiques de l'influence gouvernementale.

La Direction de la planification et de l'évaluation a élaboré le document qui constitue la contribution fédérale à un plan national de tourisme regroupant les vues des gouvernements fédéral et provinciaux et de l'industrie privée.

La direction générale s'est chargée d'organiser la Conférence des représentants officiels canadiens du tourisme de 1982, ainsi qu'une conférence fédérale-provinciale sur le tourisme. Elle s'est en outre occupée de trouver des représentants canadiens au Comité du tourisme de l'Organisation de coopération et de développement économique, qui s'est réuni en France au cours de l'année, et a dirigé la délégation canadienne à la Conférence mondiale du tourisme qui a lieu en août au Mexique.

Un système de planification opérationnelle du tourisme a été mis en place afin d'assurer la planification, la vérification et le rapport des résultats de tous les projets de l'Office de tourisme du Canada.

LA DIRECTION GÉNÉRALE DU MARKETING DU TOURISME

Au nombre des activités de marketing du tourisme, citons les suivantes :

Dans le cadre du programme " On part en vacances ", on a fait paraître des annonces

Le volume des transactions conclues à l'occasion de la sixième foire annuelle " Rendez-vous Canada ", qui s'est déroulée à Calgary du 2 au 6 mai 1982, a atteint 61 millions de dollars, soit 2 millions de dollars de moins que l'année précédente. Cette foire internationale a attiré 336 vendeurs canadiens, 220 acheteurs étrangers et 29 représentants des médias internationaux;

Le programme " Canada - Faites le tour ", qui vise à inciter les Canadiens à voyager au pays, offert, en 1982, cinquante circuits forfaitaires à prix compétitifs. Les partenaires de l'OTC étaient les sociétés Air Canada, CP Air, Pacific Western Airlines, VIA Rail et Nordair;

TourCan, foire nationale annuelle, s'est déroulée à Saskatoon du 30 août au 2 septembre 1982. Commandité conjointement par le ministère du Développement économique et du Tourisme du Manitoba et par celui du Tourisme et des Ressources renouvelables de la Saskatchewan, TourCan 82 a permis à des vendeurs de produits touristiques du Manitoba et de la Saskatchewan de rencontrer des grossistes et des voyagistes de par tout le Canada.

La banque de données sur les congrès et les voyages de motivation est devenue opérationnelle, mettant ainsi directement à la disposition de l'industrie le profil détaillé de quelque 2 000 organismes américains susceptibles de se réunir au Canada.

Près de 500 dirigeants d'associations, de planificateurs de congrès et d'investisseurs de voyages de motivation ont pu visiter les principales destinations canadiennes dans le cadre du programme de visite d'inspection des lieux.

Par ailleurs, les améliorations requises au chapitre des politiques et des procédures de l'immigration Canada ont été déterminées avec plus de précision dans le domaine de l'accréditation des réunions et des congrès d'organismes étrangers qui se tiennent au Canada et des formalités régissant l'entrée des participants au pays.

D'autre part, on a mené à l'intention des consommateurs une campagne publicitaire échelonnée sur toute l'année, en vue de créer et d'entretenir une attitude positive à l'égard du Canada en tant

de Haviland, l'entente de la compagnie Pratt & Whitney, le Comité consultatif du développement de l'industrie aéronautique relevant du ministère, le projet d'électrolyse et la modernisation de la Dome-Davie.

La Direction des investissements de l'État a été établie pour améliorer la gestion des rapports qu'entrelient le ministère avec les sociétés d'État. Les responsabilités du ministère comprennent la Banque fédérale de développement, la Société de développement du Cap-Breton, de même que la Société canadienne de brevets et d'exploitation limitée, trois organismes qui relèvent de lui; elles comprennent également la Corporation de développement des investissements du Canada, la Société de développement du Canada et la Société pour l'expansion des exportations dont les conseils d'administration regroupent notamment les sous-ministres du ministère.

La Direction des investissements de l'État fonctionne comme une "société de portefeuille" qui gère les intérêts du ministère dans les sociétés d'État relevant du ministère et qui coordonne toutes les relations ministérielles avec ces sociétés, en plus de surveiller leurs stratégies et leurs plans d'affaires.

OFFICE DE TOURISME DU CANADA (OTC)

En raison du fusionnement des ministères de l'Industrie et du Commerce (MIC) et de l'Expansion économique régionale (MEER), le personnel des bureaux régionaux de l'OTC en poste au Canada et à l'étranger a été muté au ministère des Affaires étrangères. Au pays, le personnel chargé de la mise en oeuvre du programme du tourisme du gouvernement fédéral a été redéployé parmi les 10 bureaux régionaux du MIC-MEER relevant chacun d'un directeur exécutif régional. En ce qui concerne les activités à l'étranger, des délégués commerciaux au tourisme ont été nommés dans 14 bureaux du MAE aux États-Unis et dans les missions de ce ministère au Royaume-Uni, en France, en République fédérale allemande, aux Pays-Bas, au Mexique, en Australie et au Japon. L'OTC a été chargé d'accorder une aide d'ordre fonctionnel et opérationnel aux employés des bureaux régionaux.

L'Office de tourisme compte trois directions générales :

Le programme d'aide à l'adaptation de l'industrie et de la main-d'oeuvre (PAAIM)

Dans le cadre d'un programme d'envergure mis en oeuvre par le gouvernement en janvier 1981, douze collectivités réparties dans plusieurs régions du pays ont été désignées, au cours de la dernière année financière, comme étant admissibles aux subventions fédérales visant à réduire le chômage. Dans le cadre du programme, 169 projets ont été approuvés, comportant des engagements financiers de 82,5 millions de dollars. On estime que ces projets procureront de l'emploi à 11 045 personnes.

Ce programme vise à diminuer la détresse des collectivités canadiennes en proie aux bouleversements majeurs et permanents que connaissent les industries et aux licenciements de travailleurs de la région qui y sont reliés.

LES PROJETS RÉGIONAUX ET LES INVESTISSEMENTS DE L'ÉTAT

Les principales responsabilités qui incombent à cette direction générale sont l'analyse, l'évaluation et la négociation de projets d'envergure, de même que l'appui au ministre dans l'exécution de ses responsabilités à l'égard de certaines sociétés d'État.

La direction générale compte cinq directions :

- Projets spéciaux
- Projets de développement
- Projets d'investissement
- Projets d'adaptation
- Investissements de l'État

En ce qui concerne les projets, on prend en main les cas les plus difficiles, délicats et complexes. La sélection des projets d'envergure est fondée sur des facteurs tels que les coûts, la complexité, la vulnérabilité ou l'urgence d'un projet. Il semble que les projets d'envergure et délicats nécessitent un niveau de compétence analytique qu'on ne trouve pas dans les organisations axiales. Par conséquent, la direction générale s'est dotée d'analystes financiers, économiques et commerciaux.

Durant l'année 1982-1983, les projets de la direction générale ont porté sur les sociétés Maislin, White Farm, Canadair, Airbus, Boeing,

petites entreprises, consent des prêts à terme aux petites entreprises canadiennes pour leur permettre d'améliorer toute une gamme de biens d'équipement. L'emprunteur paie, sur ces prêts garantis par le gouvernement fédéral, un intérêt fixé à 1 % de plus que les taux préférentiels des banques. La durée maximale des prêts est de dix ans.

En 1982-1983, 18 023 prêts (voir tableau 4) ont été garantis pour un montant de 458,1 millions de dollars, comparativement à 16 643 prêts d'une valeur de 491,9 millions de dollars au cours de l'exercice précédent. Les réclamations relatives à des pertes sur prêts acquittés au cours de l'exercice se sont élevées à 17,9 millions de dollars, ce qui représente une augmentation de 11,5 millions de dollars par rapport à l'exercice précédent.

Tableau 4

Prêts consentis aux termes de la Loi sur les prêts aux petites entreprises par province et territoire, 1982-1983

Territoires et provinces	Montant (en millions de \$)	
	Nombre de prêts	
Terre-Neuve	205	4,8
Île-du-Prince-Édouard	96	1,6
Nouvelle-Écosse	350	9,1
Nouveau-Brunswick	481	11,9
Québec	6 513	159,8
Ontario	3 688	100,4
Manitoba	523	12,9
Saskatchewan	1 093	29,1
Alberta	1 674	42,1
Colombie-Britannique	3 354	84,6
Yukon	28	1,0
Territoires du Nord-Ouest	18	0,8
Total	18 023	458,1

Le programme de subventions aux investissements des petites entreprises (SIPÉ) aide les petites entreprises à payer leurs intérêts sur les prêts admissibles qu'elles ont contractés. L'aide prend la forme d'une subvention pouvant s'élever à 4 %

En 1982-1983, 5 751 demandes d'aide d'une valeur de 359,3 millions de dollars ont été reçues aux termes du programme. Les subventions versées au cours de l'année se sont chiffrées à 1,3 million de dollars.

Le programme d'aide aux constructeurs de navires

Le programme d'aide aux constructeurs de navires (PACN) accorde une aide aux constructeurs de navires établis qui se livrent à la construction et à la conversion de navires aux dimensions minimales précises. Une aide est également versée pour les projets visant à augmenter la productivité dans les chantiers navals.

L'an dernier, une aide a été accordée au titre de 80 projets, pour lesquels 36,4 millions de dollars ont été autorisés. Vingt-quatre projets, d'une valeur de 23,4 millions de dollars, ont reçu des subventions au titre de la construction ou de la conversion de navires et de l'amélioration de la productivité respectivement.

Le programme d'aide aux institutions

Le programme d'aide aux institutions (PAI) a pour principal objectif d'accorder une aide financière aux institutions sans but lucratif pour leur permettre d'offrir à l'industrie et aux particuliers des services spécialisés leur permettant d'effectuer des études qui favorisent indirectement le développement industriel au Canada.

De plus, dans le cadre du programme, des subventions sont accordées aux institutions en vue d'offrir des bourses et de faire entreprendre des études dans les domaines de la gestion ou de la technologie ou pour recueillir de l'information de susceptible de contribuer à l'élaboration de politiques industrielles.

En 1982-1983, 40 projets d'un montant de 2,7 millions de dollars ont été approuvés aux termes du PAI. La plus grande partie de l'aide (2,2 millions) a été accordée à des institutions sans but lucratif ou, plus précisément, à des établissements de recherche universitaire.

Tableau 2

Contributions autorisées
au titre de l'innovation
dans le cadre du
programme d'expansion des entreprises
par province et territoire, 1982-1983

Nombre de
projets
Montant
(en millions de \$)

Terre-Neuve	6	0,2
Île-du-Prince-Édouard	5	0,4
Nouvelle-Écosse	19	1,0
Nouveau-Brunswick	10	0,8
Québec	272	22,2
Ontario	130	40,8
Manitoba	53	2,7
Saskatchewan	19	1,5
Alberta	23	2,6
Colombie-Britannique	31	26,9
Yukon	-	-
Territoires du Nord-Ouest	-	-
Total	568	99,1

On prévoit que les projets de contribution aux termes du PCE susciteront des ventes de 4,5 milliards de dollars au cours des cinq prochaines années et permettront de créer ou de maintenir 9 050 emplois.

Le programme de productivité de l'industrie du matériel de défense

Le programme de productivité de l'industrie du matériel de défense (PPMD) aide les entreprises industrielles qui fabriquent du matériel de défense ou des produits connexes. Il vise à maintenir et à relever la compétence technologique de l'industrie canadienne du matériel de défense et des industries civiles connexes. Le programme fonctionne en vertu d'accords internationaux relatifs au partage de la mise au point et de la production du matériel de défense.

Au cours de l'exercice financier 1982-1983, 155 projets d'un montant global de 181,2 millions de dollars (tableau 3) ont été autorisés. Selon les éléments du programme, ces projets se répartissent comme suit : 29 projets de recherche et de développement d'une valeur de 59,6 millions,

84 projets de production d'une valeur de 92,4 millions, 39 projets d'aide à l'immobilisation et trois études de faisabilité de 300 000 \$. La majorité de ces projets ont été mis en œuvre par des entreprises manufacturières des deux provinces centrales.

Tableau 3

Projets autorisés dans le cadre du
programme de productivité
de l'industrie du matériel de défense
par province et territoire, 1982-1983

Nombre de
projets
Montant
(en millions de \$)

Terre-Neuve	-	-
Île-du-Prince-Édouard	-	-
Nouvelle-Écosse	2	1,4
Nouveau-Brunswick	-	-
Québec	45	58,4
Ontario	86	98,5
Manitoba	9	8,7
Saskatchewan	1	1,4
Alberta	2	1,1
Colombie-Britannique	10	11,7
Yukon	-	-
Territoires du Nord-Ouest	-	-
Total	155	181,2

Le programme de recherche et de développement de l'énergie industrielle

Le programme de recherche et de développement de l'énergie industrielle (PRDEI) favorise la mise au point de procédés et de matériel nouveaux et améliore afin de réduire la consommation d'énergie dans l'industrie.

En 1982-1983, 17 projets nécessitant un financement total de 10,7 millions de dollars ont été approuvés. De ce montant, 4,5 millions de dollars représentent les dépenses réelles effectuées depuis la création du programme et 2,7 millions de dollars le montant déboursé cette année.

Le programme de prêts aux petites entreprises

Le programme de prêts aux petites entreprises, établi en vertu de la Loi sur les prêts aux

industries canadiennes de la fabrication et des services en 1982-1983.

La direction générale a participé à un certain nombre d'activités destinées à faciliter l'accroissement de l'industrie. Les discussions visant à consolider davantage les programmes actuels se sont poursuivies et des progrès notables ont été accomplis dans l'élaboration de méthodes permettant d'établir les priorités des projets d'investissement. Enfin, la direction a élaboré une meilleure voie hiérarchique en vue d'arriver à gérer plus efficacement les budgets des programmes.

On a eu recours à des techniques de prévision améliorées et l'on a intensifié la vérification administrative des engagements pris aux termes de programmes pluriannuels. Les méthodes de mise en oeuvre des programmes ont été rationalisées afin d'augmenter l'efficacité du traitement des dossiers et la rapidité des versements.

Les sections suivantes offrent un résumé des activités menées dans le cadre des principaux programmes administrés par le ministère au cours de l'exercice financier 1982-1983.

Le programme d'expansion des entreprises

Le programme d'expansion des entreprises (PEE) aide les entreprises de fabrication et de transformation à devenir plus rentables et plus concurrentielles à l'échelle internationale. Ce programme d'aide prévoit le partage des coûts du projet ou permet de garantir, en dernier ressort, les prêts à terme. En 1982-1983, 104 garanties de prêts destinées à favoriser l'adaptation des entreprises (voir tableau 1) d'une valeur de 104,1 millions de dollars ont été autorisées, ce qui devrait contribuer à créer ou à maintenir quelque 4 550 emplois au cours des cinq prochaines années.

Tableau 1

Garanties de prêts autorisées
au titre de l'adaptation des entreprises,
par province et territoire, 1982-1983

Montant (en millions de \$)	Nombre de projets
Terre-Neuve	1
Ile-du-Prince-Édouard	2
Nouvelle-Écosse	16
Nouveau-Brunswick	6
Québec	19
Ontario	34
Manitoba	10
Saskatchewan	-
Alberta	2
Colombie-Britannique	14
Yukon	-
Territoires du Nord-Ouest	-
Total	104
104,1	-

De plus, des contributions d'une valeur de 99,1 millions de dollars ont été autorisées pour acquiescer les coûts de 568 projets d'innovation et de mise au point de produits dans des industries comme la machinerie, l'électronique, les pièces de navire, les véhicules à moteur, les composants du bâtiment et le textile (tableau 2). Les totaux ci-dessus incluent 149 projets APT (aide à la productivité au moyen de techniques) d'une valeur autorisée de 26 millions de dollars. Ce programme vise l'accroissement de la productivité dans l'industrie canadienne en encourageant l'utilisation de procédés et de nouvelles techniques de production et de conception de tribunaux de l'électronique et l'utilisation de la micro-électronique pour améliorer la qualité et créer de nouveaux produits.

préparerait un guide sur le marché de l'exportation lequel est destiné aux petites entreprises.

La Direction des opérations a assuré au ministre le soutien du Comité consultatif de la petite entreprise qui a été établi en septembre 1982. Ce comité regroupe 22 représentants de la petite entreprise, des banques, des universités, des associations et d'autres domaines de compétence. Aux termes du programme d'excellence dans la gestion de la petite entreprise, administré par la Direction des opérations, 58 propositions d'aide ont été recommandées et approuvées ensuite par le groupe consultatif. Les propositions approuvées totalisaient 416 850 \$ et visaient l'élaboration de matériel didactique, la recherche et les bourses d'études.

Le Bureau de défense a organisé des réunions avec les 16 membres du Comité interministériel de la petite entreprise, et leur a fourni le soutien nécessaire.

Les relations entre le gouvernement et les fournisseurs de la petite entreprise se sont améliorées grâce à l'introduction d'une politique de paiement rapide qui s'applique à tous les fournisseurs du gouvernement. Le secrétaire a travaillé de concert avec le Bureau du contrôleur général lors de la conception et de la mise en oeuvre de la politique, laquelle exige que les ministères gouvernementaux paient leurs fournisseurs dans les trente jours suivant l'exécution du contrat ou qu'ils paient des intérêts sur les comptes en souffrance.

LES PROGRAMMES RÉGIONAUX ET INDUSTRIELS

LA DIRECTION GÉNÉRALE DES PROGRAMMES

La Direction générale des programmes est chargée de la gestion et de l'administration générales des principaux programmes industriels financés par le ministère, dont les prêts, les assurances-prêts, les subventions et les contributions. Elle petites entreprises, en vertu de laquelle des prêts garantis sont consentis par des prêteurs du secteur privé désignés afin d'aider les petites entreprises commerciales. L'aide financière offerte par le ministère, sous forme de prêts, de subventions et de garanties de prêts, a continué de représenter un facteur essentiel de la stimulation et de l'expansion commerciale des

La Direction des analyses économiques à court terme fournit des conseils et des services d'analyse de la situation actuelle et à court terme de l'économie canadienne; elle étudie aussi en fonction de l'économie des États-Unis et de celle de ses principaux partenaires commerciaux au sein de l'OCDE. Ce travail comprenait l'évaluation analytique des développements historiques et des perspectives à court terme pour la consommation personnelle, les investissements commerciaux, les dépenses gouvernementales et les initiatives de programme, de même que le rendement commercial des marchandises.

La direction a également effectué des évaluations analytiques portant sur la position concurrentielle du Canada, la position des marchandises et la position de la balance des paiements par rapport à nos principaux marchés, en particulier les États-Unis et les pays côtiers du Pacifique. Pour ce qui est des développements régionaux, la direction a coordonné les efforts ou perspectives et les prévisions économiques provinciales, en plus de mettre sur pied des rapports périodiques de la conjoncture économique provinciale, en regard aux programmes ministériels.

Le Secrétariat de la petite entreprise

La Direction de la politique d'expansion de la petite entreprise a collaboré à l'élaboration de diverses initiatives nationales visant à améliorer les perspectives et le climat économique dans le secteur des affaires. Cela comprend la subvention aux investissements des petites entreprises la prolongation jusqu'en décembre 1983 des obligations des petites entreprises, annoncée dans le discours du ministre des Finances en octobre 1982.

Le secrétariat a identifié et analysé les questions clés auxquelles font face les petites et les moyennes entreprises et a fait connaître la perspective de la petite entreprise sur les exercices de politique du MIC-MEER et des autres ministères. Le secrétariat a représenté le gouvernement canadien à la Conférence internationale sur la politique relative à la petite entreprise, laquelle s'est tenue à Osaka, au Japon, en janvier 1983.

Le secrétariat a publié trois études sur les circonstances entourant l'insolvabilité des entreprises, y compris les facteurs menant à la faillite, ainsi qu'une comparaison du cadre législatif relatif à la faillite au Canada et aux États-Unis. On a également appuyé l'institut de technologie de la Colombie-Britannique qui

LA DIRECTION DE LA POLITIQUE DE DÉVELOPPEMENT INDUSTRIEL

Il y a deux secteurs, soit une Direction de la politique de développement industriel et une Direction de la politique commerciale, industrielle et régionale.

La principale initiative de cette direction fut de développer le nouveau programme de développement industriel et régional. En plus de l'élaboration du programme même, la direction a contribué largement à la formulation d'un indice de développement qui servira d'un point de départ objectif et équitable pour déterminer les niveaux d'aide aux termes du programme selon la situation géographique.

En se fondant sur le niveau de chômage et de revenu par personne dans chaque district de recensement et sur la capacité fiscale des provinces, l'indice permet de déterminer les divers niveaux d'aide dans les régions du pays. Cet indice sera tenu par la Direction de la politique de développement industriel et mis à jour annuellement.

Les responsabilités courantes de la direction en matière de politique comprennent : la préparation et l'analyse des indices d'utilisation de la capacité industrielle, l'enquête semestrielle sur les investissements commerciaux et l'enquête annuelle sur les filiales à propriété étrangère.

Les autres travaux dans le secteur de l'analyse des coûts et avantages comprennent l'achèvement de l'étude sur le projet Manfor, de même qu'une analyse des coûts et des avantages pour un projet de Manitoaba. De même, on a poursuivi des travaux relatifs à la préparation d'un manuel complet portant sur l'examen de l'évaluation.

En 1982-1983, on a entrepris des travaux à l'appui d'une proposition visant à mettre sur pied un centre de productivité. De même, on a élaboré une proposition touchant la reconnaissance des réalisations exceptionnelles dans les domaines du design, de la productivité et de l'innovation, et on a contribué grandement aux travaux qui ont amené la redéfinition du rôle et du mandat de la Banque fédérale de développement.

LA DIRECTION GÉNÉRALE DE LA POLITIQUE COMMERCIALE, INDUSTRIELLE ET RÉGIONALE

La Direction générale comprend quatre directions.

La Direction de l'élaboration et de l'analyse de la politique industrielle évalue l'incidence,

sur le développement industriel et régional, des diverses questions de politique d'exportation et d'importation et fait en sorte que l'on tienne compte des perspectives industrielles sectorielles dans la formulation de la politique commerciale du gouvernement. La direction se voit confier un rôle de coordination en ce qui touche la prise de position du ministère face aux intérêts sectoriels et régionaux.

Au cours de l'année, les questions de politique commerciale ont été aussi nombreuses que variées. La direction a travaillé avec le ministère des Affaires extérieures à l'élaboration de la "Politique commerciale du Canada pour les années 80" et de plusieurs autres questions commerciales bilatérales et multilatérales. En vue de mener à bien son mandat, la direction s'occupe au jour le jour des questions commerciales qui surgissent dans les autres ministères et sur la scène internationale, notamment le GATT et l'OCDE. L'orientation de projets de la direction comporte actuellement une analyse des relations entre le développement régional et le commerce, de même que la participation à l'étude sur l'éventualité du libre-échange sectoriel entre le Canada et les États-Unis et sur l'éventualité de zones de libre-échange.

La Direction de l'élaboration et de l'analyse de la politique industrielle et régionale a fait porter ses efforts sur l'exercice de planification ministérielle, contribuant à élaborer une politique de développement industriel, nationale et régionale en consultation avec les bureaux régionaux du ministère et les directions du secteur de l'industrie. La direction a procédé à une analyse de la désignation régionale des programmes ministériels et a contribué à la formulation de l'indice de développement. De plus, elle a servi comme source régionale de renseignements et elle a fourni des données régionales sur une vaste gamme de questions de politique au sein du ministère.

La Direction de la politique d'adaptation industrielle et de l'analyse des structures s'est chargée de maintenir le modèle économique du ministère (CEMSA) et a préparé un bon nombre de projections économiques à moyen terme qui ont servi au processus de planification du ministère comme base de travail pour calculer l'incidence des politiques et comme apport aux prévisions professionnelles effectuées par la Commission canadienne de l'emploi et de l'immigration. On a consacré beaucoup de travail à l'évaluation des mesures découlant de la politique d'adaptation industrielle, tant sur le plan national qu'international, en vue de faciliter l'adaptation industrielle future dans l'économie canadienne.

partie du marché concernant la vente d'huile de canola à l'Algérie et doit y livrer entre 70 000 et 100 000 tonnes d'huile de canola en 1983. C'est grâce aux efforts de promotion commerciale et aux colloques techniques dirigés par le bureau que ce contrat a pu être ratifié.

L'Administration chargée de la stabilisation concernant le grain de l'Ouest a signalé que la récolte de céréales de printemps brutes des ventes de céréales de printemps brutes pour l'année civile 1982 ont totalisé 5,9 milliards de dollars, soit près de 350 millions de moins que l'année précédente. Toutefois, même si les recettes brutes et l'avoi- net ont été moins élevés, les rentrées de caisses en 1982 ont été plus élevées que la moyenne de nouvelles rentrées de caisses des cinq dernières années. De ce fait, aucun versement n'a été effectué à même le Fonds de stabilisation en 1982. Le ministère a contribué au Fonds dans une proportion de 4 % des recettes brutes des producteurs qui sont imposés, conformément à la Loi de stabilisation concernant le grain de l'Ouest.

Compte tenu des changements prévus dans les tarifs de transport en vertu du projet de loi C-155, le programme visant à aider l'industrie de la transformation du canola de l'Ouest canadien en ce qui concerne les tarifs de transport n'a pas été prolongé après son expiration le 31 mars 1983. Depuis 1976, le gouvernement y affectait 3 millions de dollars par an.

L'aide accordée en vertu du programme de développement des marchés d'exportation (PDME) a été axée sur la promotion commerciale et l'expansion des marchés dans le cadre de divers projets portant sur les oléagineux, y compris une campagne de promotion des huiles alimentaires, une mission de producteurs de canola au Japon et la participation à une foire commerciale en Algérie.

LA POLITIQUE RÉGIONALE ET INDUSTRIELLE

Le mandat de ce secteur consiste à élaborer et à formuler des recommandations de politique ainsi qu'à développer des compétences spécialisées en analyse et politique dans les domaines de la petite entreprise et des renseignements économiques, des recherches futures, de la planification stratégique, de l'incidence des politiques commerciales sur l'industrie et des relations avec les autres ministères sur des questions économiques.

Les principaux pays exportateurs de céréales en vue d'examiner l'évolution du commerce international.

La capacité de broyage du canola s'est encore accrue grâce à l'ouverture, au milieu de 1982, d'une nouvelle usine au Manitoba pouvant broyer 600 tonnes de canola par jour. Une nouvelle usine, ayant la même capacité, devrait être mise en exploitation en Ontario au milieu de 1983. En outre, une nouvelle installation de traitement, qui sera construite en Alberta, fournira 320 000 tonnes de ce produit à l'industrie. L'installation devrait commencer ses activités de traitement à l'automne de 1984. Environ 2 millions de tonnes de graines oléagineuses ont été broyées en 1982.

Les paiements anticipés versés aux producteurs dans le cadre du programme des paiements anticipés pour le grain des Prairies, se sont chiffrés à 309 millions de dollars, soit une légère diminution par rapport au niveau record atteint l'année précédente. En raison de cette réduction et de la baisse des taux d'intérêt, les coûts en intérêts absorbés par l'État ont diminué de 1,1 million de dollars pour se fixer à 11,6 millions.

Au cours de l'exercice, l'usine pilote POS (protéines, huiles et amidon) a atteint son plus haut niveau d'activité depuis sa création. Un certain nombre de projets offrant de grandes possibilités sur le plan commercial ont été menés à bien. Des négociations ont été entreprises avec une importante firme alimentaire en vue d'utiliser, selon un régime de redevances, l'un des dérivés pouvant entrer dans la composition d'aliments diététiques.

Pendant l'exercice, l'Institut international du Canada pour le grain a offert 13 cours dont sept s'adressaient à des participants étrangers et six à des Canadiens. Depuis 1971, des représentants de plus de 70 pays ont participé à des programmes internationaux conçus et exécutés dans le cadre des plans canadiens d'expansion des marchés de l'industrie des céréales et des graines oléagineuses. L'Institut est financé conjointement par le MIC-MEER et la Commission canadienne du blé.

Le Bureau de la commercialisation des céréales a parallèlement des missions sur les oléagineux provenant du Japon, du Venezuela, de l'Inde et de la Yougoslavie, ainsi que des colloques techniques qui ont été tenus au Venezuela, en Norvège et en République fédérale allemande. Les consultations annuelles entre le Canada et le Japon ont eu lieu à Winnipeg. Le Canada a entrepris la deuxième

fin au cours de l'exercice, huit collectivités sont encore admissibles aux prestations offertes dans le cadre du programme. Pendant l'exercice, 40,6 millions de dollars ont été répartis entre les 112 projets approuvés. Dans le cadre du programme d'aide à la réorganisation de certaines industries, 47 projets ont été approuvés.

LE BUREAU DE LA COMMERCIALISATION DES CÉRÉALES

Les grandes cultures, la forte concurrence à l'échelle mondiale et l'accroissement de l'efficacité du réseau canadien de manutention et de transport ont été des faits marquants au cours de l'exercice pour le secteur des céréales et des grains oléagineux. Les exportations des principales céréales et grains oléagineux sont passées de 6,1 milliards de dollars en 1981 à 6,3 milliards en 1982.

Ces exportations ont atteint les niveaux suivants en 1982 :

- blé : 19,2 millions de tonnes (4,3 milliards de dollars);
- orge : 5,7 millions de tonnes (886 millions de dollars);
- maïs : 715 000 tonnes (113 millions de dollars);
- seigle : 451 000 tonnes (72 millions de dollars);
- avoine : 82 000 tonnes (16 millions de dollars);
- farine de blé : 308 000 tonnes (évaluées à 110 millions de dollars); et,
- principaux oléagineux et produits : 2,3 millions de tonnes (évaluées à 800 millions de dollars).

Le volume total des exportations de ces produits a donc augmenté de près de 14 % par rapport à 1981.

Le bureau a parrainé cinq missions de visiteurs et trois colloques techniques dans des pays qui sont actuellement importateurs ou qui pourraient le devenir. Il a fourni de l'information aux entreprises canadiennes qui envisagent de visiter des pays susceptibles d'importer leurs produits. L'une des principales réalisations au cours de l'exercice a été la signature d'une entente à long terme entre le Canada et le Brésil pour la vente de blé dont le volume variera entre 3 et 4,5 millions de tonnes entre janvier 1983 et décembre 1985. Plus d'un tiers des exportations de blé, ainsi qu'une grande partie des ventes d'orge, a été réalisé grâce au programme des ventes de blé à crédit administré par le bureau. Pour maintenir la coopération avec les exportateurs, des pourparlers ont été entamés avec

deux bourses d'études, totalisant 15 850 \$, ont été accordées à des étudiants dans le domaine de la création industrielle, de la décoration d'intérieur et des arts graphiques pour leur permettre de poursuivre leurs études dans des universités canadiennes et étrangères.

La remise des Prix Design Canada de 1983 a eu lieu à Ottawa, le 2 juin 1983. Au total, 125 présentations ont été reçues, et ce, jusqu'à la fin janvier 1983. Les présentations ont été ensuite évaluées. À la fin de février, le jury a établi la liste des dix-neuf lauréats.

Une conférence au sujet de l'incidence des nouvelles techniques sur la productivité et la mise au point des produits a été tenue à Vancouver, 350 représentants de sociétés ont participé à cet événement de deux jours.

Le Conseil national de l'esthétique industrielle a tenu trois réunions statutaires et un certain nombre de réunions de comités portant sur divers sujets tel l'enseignement.

Le Conseil national de l'esthétique industrielle, en collaboration avec l'industrie, a lancé un concours national de design auquel ont participé 200 dessinateurs de par tout le Canada. Les noms des lauréats seront annoncés en juin 1984.

Le programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre

Ce programme vise à alléger la détresse des collectivités canadiennes en proie aux bouleversements majeurs et permanents que connaissent les industries et aux licenciements subséquents de travailleurs dans la région visée. Le programme a deux composantes : le programme d'adaptation industrielle axée sur les collectivités (PAIC) incite les entreprises à entreprendre des projets d'immobilisations viables pour venir en aide à des collectivités canadiennes désignées qui sont touchées par de sérieux bouleversements industriels; et, le programme d'aide à la réorganisation de certaines industries (PARCI) offre de l'aide à deux secteurs industriels, les pièces d'automobile et les gros appareils ménagers, et aide les petites et moyennes entreprises de ces secteurs à entreprendre des projets viables de création d'emplois. Les collectivités et les industries sont désignées pour une période limitée.

En vertu du programme d'adaptation industrielle axée sur les collectivités, 12 collectivités de différentes régions du pays ont été désignées admissibles à l'aide fédérale. La période d'admissibilité de quatre des collectivités a pris

Le vêtement

Le produit intérieur réel a diminué de 15,3 % dans le secteur du tricot en 1982. Les dépenses à la consommation liées à l'habillement sont demeurées assez stables, mais leur pourcentage par rapport à l'ensemble des dépenses à la consommation a quelque peu diminué. L'emploi a également été touché, accusant une baisse par rapport à 1981 de 14,8 % dans l'habillement et de 10,2 % dans le secteur du tricot. Le taux d'utilisation de la capacité est tombé à 70 %, soit le plus bas niveau depuis les six dernières années. Les importations ont augmenté de 5,2 % en 1982 et de 13 % au cours des trois premiers mois de 1983. En revanche, les exportations ont diminué de 8,6 % en 1982 par rapport à l'année précédente. Une certaine amélioration s'est produite en 1983, l'indice du produit intérieur réel ayant augmenté de 8,2 % dans l'habillement et de 7,9 % dans le secteur du tricot au cours du premier trimestre. Le taux d'emploi a augmenté légèrement et un nombre moins élevé de travailleurs ont participé au programme fédéral de partage d'emploi par rapport à la même période en 1982.

La direction a continué de fournir à l'OCRI des études du marché et de l'industrie afin de l'aider à évaluer les demandes d'aide. En 1982, 124 entreprises de l'industrie de l'habillement ont présenté une demande d'aide. Lors de la renégociation d'ententes bilatérales avec les pays à faibles coûts de production et à commerce nationalisé, la direction a fourni aux équipes de négociation un aperçu détaillé de chaque secteur et des évaluations quant aux tendances des marchés; elle a également participé à ces négociations. En 1982-1983 des ententes ont été conclues avec l'Inde, Singapour, le Pakistan, la Hongrie et la Tchécoslovaquie.

Les chaussures autres qu'en caoutchouc Dans son effort constant pour augmenter la participation de l'industrie sur les marchés d'exportation et pour stimuler son intérêt à cet égard, la direction a contribué à l'organisation de foires commerciales et au recrutement d'exposants pour plusieurs expositions internationales axées sur les exportations.

En 1982, le marché apparent de la chaussure a accusé une baisse de 11,8 % et la part du marché que détient l'industrie est passée de 42 % en 1981 à 40 %. L'industrie de la chaussure a produit 34,1 millions de paires de chaussures, soit une diminution de 15,5 % par rapport à l'année précédente. Le taux d'emploi a diminué de 14 %.

DESIGN CANADA

Tous les secteurs ont accusé une baisse. Seules les exportations ont augmenté en 1982, et ce, dans une proportion de 12 %, presque entièrement grâce aux exportations de chaussures spéciales et de chaussures d'athlétisme.

En 1982, la direction a évalué les demandes d'aide présentées à l'OCRI par 31 entreprises du secteur de la chaussure et de la tannerie. Pour venir en aide à l'industrie nationale de la chaussure en cuir, le gouvernement a imposé, en juillet 1982, des contingents à l'importation sur les chaussures en cuir, y compris les chaussures en vinylo, en provenance de tous les pays. Les contingents imposés en 1983 pour les importations de chaussures en cuir s'élevaient à 11,4 millions de paires et celui imposé pour les chaussures autres qu'en cuir, y compris les chaussures en toile, est de 35,1 millions de paires; les deux contingents doivent prendre fin le 30 novembre 1984. La direction a participé à des négociations de mesures de compensation avec la CEE et les États-Unis relativement à l'imposition de ces contingents.

Design Canada, qui est chargé de promouvoir l'amélioration de l'esthétique industrielle au sein de l'industrie canadienne, a pour objectif de satisfaire aux exigences du Conseil national de l'esthétique industrielle et de mettre en œuvre les programmes du ministère. Voici quelques-unes de ses activités :

- subventionner les entreprises, par le biais d'accords relatifs au partage des coûts avec les provinces, dans le cadre du programme de gestion de la mise au point des produits (PGMP);
- organiser des colloques sur l'esthétique industrielle à l'intention des dessinateurs et des entreprises;
- offrir aux entreprises des services de consultation dans le domaine de l'esthétique industrielle; et,

• administrer un programme de bourses d'études afin d'accroître la qualité de l'esthétique industrielle au Canada.

Le service de consultation en esthétique industrielle s'occupe de cas liés à des programmes ministériels, répond aux demandes de renseignements de l'industrie, aide d'autres ministères et collabore avec les spécialistes en esthétique industrielle.

la direction a continué d'appuyer la restructuration et la modernisation des industries, de réduire la dépendance des collectivités à l'égard de ces industries et d'aider les travailleurs qui sont touchés de façon à ce que le gouvernement n'ait pas à renouveler les mesures de protection spéciales.

La direction a contribué au renouvellement d'ententes bilatérales avec des pays à faibles coûts de production et à commerce nationalisés, a aidé les divers secteurs à repêcher et à exploiter des débouchés sur les marchés national et internationaux, a conseillé l'Office canadien pour un renouveau industriel (OCRI) relativement à l'aide à l'adaptation industrielle, a collaboré avec les ministères concernés en ce qui a trait aux questions liées aux faibles coûts de production et aux importations, et a assuré la liaison avec l'industrie et les organisations privées.

Le textile

La situation du marché s'est aggravée en 1982, ce qui a entraîné d'autres réductions sur le plan des activités, de l'emploi et de la rentabilité. Ce n'est qu'au cours du dernier trimestre de 1982 que l'on a remarqué une tendance à la hausse, tout particulièrement dans le secteur des fournitures de maisons. La valeur totale du marché des textiles a atteint près de 6 milliards de dollars en 1982, soit une baisse de 15 % en termes monétaires par rapport à 1981. Les exportations et les importations ont diminué de 14 et de 9 % respectivement. Le taux d'emploi a baissé de 15,8 % en 1982 pour se fixer à 62 800 personnes occupées.

Après l'annonce de la nouvelle politique gouvernementale pour les secteurs du textile et de l'habillement, des ententes en vue de restreindre les importations de certains produits textiles primaires devaient être négociées aussitôt que possible avec 12 fournisseurs à faibles coûts de production ou à commerce nationalisés. En 1982-1983, la direction a contribué à la négociation d'ententes bilatérales avec l'Uruguay (filés de laine peignée) et avec le Brésil (filés d'acrylique). La direction a évalué les demandes d'aide financière que 75 entreprises du secteur du textile ont présenté à l'OCRI en 1982. Cette dernière a également étudié des mesures antidumping concernant les cordes de polypropylène et de nylon, les ficelles de bottelage synthétiques et les tissus de filaments de polyester servant à la fabrication de vêtements, et elle a évalué l'incidence à court et à moyen termes de ces mesures sur l'industrie et le marché.

gouvernement américain, les nouveaux règlements du gouvernement fédéral sur le transport des matières dangereuses, l'élaboration d'une stratégie sectorielle sur l'industrie du transport des marchandises au Canada, le règlement de la question touchant les subventions au titre des tarifs de transport des marchandises dans les portiques, ainsi que la réalisation d'études des conséquences qu'aurait la ratification, par le Canada, de la Convention des Nations unies sur le transport multimodal international.

Le transport de surface

La section a participé à la supervision de la question du Tarif du Pas du Nord-du-Corbeau, et a également contribué à la résolution du moratoire concernant les licences imposées par les États-Unis aux transporteurs routiers canadiens. Le Comité interministériel du transport routier international a tenu la section au courant de l'entrée des transporteurs routiers américains sur le marché canadien.

Les maisons de commerce extérieur

La section a dirigé une mission sur les maisons de commerce extérieur dans le sud-est de l'Asie. Cette mission a permis de faire connaître les nouveaux marchés à certains participants, d'accroître les connaissances des autres ainsi que d'aider les participants à trouver des courtiers étrangers pour la distribution des biens de consommation et des biens industriels canadiens.

La section s'occupe également de la tenue du Répertoire des maisons de commerce canadiennes. Ce répertoire est distribué aux gens d'affaires et au public en vue d'attirer l'attention sur le secteur des maisons de commerce extérieur.

Le franchisage

Les activités de franchisage ont été axées sur la distribution de deux brochures d'information intitulées : l'Expansion de votre commerce par le franchisage et documentation pour colloque sur l'achat d'une franchise, ainsi que sur la publication d'un rapport statistique sur les activités de franchisage au Canada de 1976 à 1981.

LE BUREAU DE L'ADAPTATION INDUSTRIELLE

La Direction du textile, du vêtement et de la chaussure

Dans le cadre de la politique annoncée en 1981 pour les industries canadiennes du textile, de l'habillement, de la chaussure et de la tannerie,

La division a élargi son programme de colloques sur l'accroissement de la productivité, lesquels ont été tenus dans dix villes canadiennes. Ces colloques visent l'amélioration des méthodes de gestion et de planification du processus de construction sur place.

La division a entrepris une étude du marché de la construction à Hong-kong, en Indonésie, à Singapour et en Thaïlande. Elle a également organisé une mission sur la coopération industrielle en provenance de la Suède; cette mission portait sur l'économie de l'énergie dans les processus de construction et industriels.

La division est le service de liaison du ministère en ce qui concerne les énergies renouvelables, tout particulièrement l'énergie solaire, et, à ce titre, elle a participé activement aux travaux du Comité interministériel des programmes d'énergie solaire ainsi qu'à une étude de l'industrie solaire menée par le ministère de l'Énergie, des Mines et des Ressources.

La Division des services de consultation

La Division des services de consultation a collaboré avec des entreprises et des associations pour ce qui est de surmonter les difficultés touchant l'industrie et d'aider ces dernières dans le cadre des initiatives visant à accroître l'exportation des services de consultation.

Le Comité consultatif de l'industrie canadienne des ingénieurs-conseils a présenté au ministre des recommandations portant sur les sujets suivants : les débouchés intérieurs, les politiques et les méthodes d'acquisition, les débouchés en matière d'exportation, les possibilités offertes par les grands projets, la recherche et le développement, la régionalisation et le choix des localités, ainsi que l'effectif des ingénieurs. Pour préparer les réponses du gouvernement à ces recommandations, la division a tenu des consultations avec d'autres ministères fédéraux responsables de l'incidence de chaque recommandation sur le plan de la politique.

La division a effectué une étude des exportations selon un échantillon de 35 des entreprises d'ingénieurs-conseils les plus dynamiques sur le marché des exportations afin de déterminer la valeur annuelle des contrats de services de consultation, les secteurs et les régions concernés, les sources de financement ainsi que les retombées réelles et éventuelles.

Pour appuyer les initiatives des entreprises canadiennes auprès des organismes de prêt internationaux, la division a participé, avec des

représentants de l'Association des ingénieurs-conseils du Canada, à des réunions avec la Banque mondiale, la Banque interaméricaine de développement, à Washington, le PNUD, à New York, et la Banque africaine de développement, à Abidjan.

La Division des services de transport

La division a collaboré avec les particuliers et les sociétés qui s'occupent d'expédition ainsi qu'avec les associations industrielles pour tenter de résoudre certains problèmes relatifs aux transports et pour repérer de nouveaux débouchés.

Le transport maritime

La section a participé activement à des discussions à l'échelle interministérielle portant notamment sur l'établissement d'une marine marchande canadienne, la désignation d'une entreprise de transport nationale, une stratégie défensive de transport maritime ainsi que sur la Loi dérogatoire sur les conférences maritimes.

Le Répertoire des services de transport maritime a été tenu à jour et mis à la disposition des entreprises d'expédition. Le répertoire décrit 125 services de transport maritime à partir des ports canadiens vers les marchés d'exportation.

Le transport aérien

La section a continué à se montrer très attentive aux intérêts des voyageurs par ailleurs, des entreprises d'expédition et de l'industrie touristique, en participant au règlement d'un certain nombre de questions liées à la politique du transport aérien, y compris les négociations sur les services de transport aérien entre le Canada et les États-Unis, la politique relative au transporteur aérien intérieur, les services de l'ADAC entre Toronto, Montréal et Ottawa, et l'examen de la politique d'aviation civile internationale. En outre, la section a participé à l'élaboration d'un projet d'évaluation de la qualité des services de transport, dont le ministère se servira pour résoudre des questions de politique et de réglementation.

Les services de trafic

La section a fait valoir le point de vue des entreprises canadiennes d'expédition lors de la formulation d'un certain nombre de politiques et elle a contribué à l'expansion de l'industrie des services de trafic. Les initiatives qu'elle a prises concernaient notamment l'évaluation, aux fins de la fixation des droits de douane, des coûts de transport intérieur proposés par le

En raison des difficultés économiques, de nombreux fabricants d'articles de loisirs ont demandé une aide financière dans le cadre des programmes du ministère. Le secteur des imprimées commerciales a été l'un des principaux bénéficiaires de l'aide accordée en vertu du programme de subventions au développement régional. En collaboration avec le ministère des Affaires extérieures, le ministère a parrainé un stand national à sept foires commerciales internationales dans quatre pays (États-Unis, Angleterre, République fédérale allemande et Italie) et a organisé trois expositions solos au Japon, ainsi que des missions d'acheteurs provenant des États-Unis, de l'Australie et de la Nouvelle-Zélande.

Les meubles

En 1982, les expéditions de meubles ont totalisé 2,3 milliards de dollars, soit une baisse d'environ 16 % par rapport à 1981. Toutefois, les fabricants canadiens ont augmenté leur part du marché intérieur, car les importations de meubles ont diminué de 37 %, passant de 344 millions en 1981 à 250 millions en 1982. Les exportations ont augmenté de 9 %, passant de 279 millions de dollars à 306 millions au cours de la même période.

L'aide fournie dans le cadre des programmes de subventions du ministère a permis à un certain nombre de fabricants d'entreprendre des projets de restructuration, d'accroissement de la productivité et de conception de produits.

Avec l'aide du ministère, le secteur de l'ameublement commercial a participé à des expositions solos à Minneapolis, à Boston, à Seattle et à Atlanta. En 1982, les exportations de meubles de bureau ont atteint 166 millions de dollars, soit 35 % des expéditions manufacturées.

A DIRECTION GÉNÉRALE DES INDUSTRIES DE SERVICES

La Direction générale des industries de services est responsable de la coopération du ministère avec les entreprises canadiennes de services. Elle a participé à des activités touchant le commerce de gros et de détail, les services de

mise en marché, la construction, les énergies renouvelables, les bureaux de conseillers, ainsi que divers services de transport et de trafic.

La Division des services de distribution

A la suite de la parution du Rapport du Comité consultatif des services de distribution, achevé en avril 1982, la division a entrepris la préparation des réponses du gouvernement fédéral aux 71 recommandations du rapport.

La division a accru ses efforts pour faire en sorte que les distributeurs canadiens pénètrent davantage les marchés internationaux. Elle a coordonné, avec la Coopération Union of Canada, une étude en vue d'évaluer la possibilité d'utiliser le réseau international des marchés coopératives pour ouvrir de nouveaux marchés internationaux à l'intention des coopératives canadiennes. L'étude comprenait des missions commerciales en Europe et dans le sud-est de l'Asie, des consultations avec les organisations membres et avec des ministères fédéraux.

En 1982, la division a assuré l'élaboration et l'essai d'un système de mesure de la productivité à l'intention des détaillants. Au début de 1983, la Direction générale des industries de services a engagé une entreprise d'experts-conseils pour élaborer une trousse d'information à distribuer aux détaillants qui désirent adopter le système.

La Division de la construction

La Division de la construction a axé ses activités sur l'accroissement de la productivité et de l'efficacité des industries de la construction et sur leur rendement sur les marchés d'exportation, ainsi que sur les services immobiliers et les sources d'énergie renouvelables. Elle a assuré un service de secrétariat et de soutien à temps plein pour les activités du Conseil pour l'expansion de l'industrie de la construction (CEIC), qui fournit des conseils au ministère.

Compte tenu des grands problèmes auxquels l'industrie du bâtiment doit faire face au cours des années 80 et après, le CEIC a formé un groupe d'étude qui devrait publier un rapport intitulé The Decade Ahead en 1983-1984.

La Division de la construction a appuyé les activités du CEIC, ce qui a donné lieu à la création du Comité interministériel de la construction non résidentielle. Le comité doit coordonner l'élaboration de la politique du gouvernement fédéral et la mise en œuvre des programmes qui pourraient influer sur le rendement du secteur de la construction non résidentielle.

Les produits d'origine animale

La promotion des exportations de bovins et de porcs de reproduction ainsi que de semences et d'embryons s'est poursuivie. Des expositions ont été organisées au Salon international de l'agriculture, en France, aux expositions Royal Highland et Royal Agricultural, en Grande-Bretagne, ainsi qu'à l'exposition Royal Easter, en Australie. Des missions à destination et en provenance du sud-est des États-Unis ont donné lieu à des ventes d'animaux de reproduction. Enfin, de nombreux acheteurs de différents pays sont venus rencontrer des éleveurs et des exportateurs canadiens de bétail.

Les produits des pêches

La division a coordonné des demandes d'acheteurs étrangers désireux de trouver des fournisseurs pour divers produits laitiers. Les ventes à l'exportation ont été maintenues à des niveaux élevés. Le ministère a continué d'explorer des marchés en vue de vendre du bœuf, du porc, des viandes transformées, des sous-produits de la viande, de la volaille et des produits connexes, de la viande de cheval, ainsi que des fourrures.

La division a coordonné la participation de l'industrie des pêches à un certain nombre de missions au Canada et à l'étranger, d'expositions commerciales et d'activités de promotion. Au nombre de ces activités, figuraient une mission sur le poisson salé au Brésil; une mission d'acheteurs provenant de l'Australie, de l'Égypte, de la Grèce et du Nigeria; et la participation à la Saudi Food 83, au Salon international de l'alimentation (SIAL), en France, à l'exposition de la National Restaurant Association (NRA) et à la Seafood 83, aux États-Unis.

Même si les exportations totales de produits canadiens des pêches ont augmenté, passant de 1,5 milliard de dollars en 1981 à un nouveau record de 1,6 milliard en 1982, l'industrie canadienne des pêches a fait face à de graves difficultés économiques. La division a grandement contribué au travail du groupe d'étude sur les pêches dans l'Atlantique, en participant aux réunions des comités du groupe et en préparant des exposés. La division a également participé à la restructuration financière des coopératives de commercialisation du poisson.

La division a mis sur pied une entreprise dirigée en vue d'exporter de grandes quantités de maquereau au Nigeria et dans d'autres pays africains, en collaboration avec des consortiums spécialisés dans les provinces de l'Atlantique. Cette initiative a permis de livrer une cargaison

Les produits d'épicerie

de près de 2 000 tonnes de maquereau valant 1,5 million de dollars. La division a aidé, par le biais du programme PDME, à mettre au point un système de collecte logistique qui a permis d'accroître la transformation et l'exportation de cette espèce sous-exploitée.

Les articles de loisirs

Au cours de l'exercice, les activités de promotion axées sur le consommateur comprenaient des campagnes publicitaires dans les magasins. Ces initiatives de commercialisation collective ont été entreprises en collaboration avec la chaîne Seiyu (au Japon) et la chaîne Safeway (dans l'ouest des États-Unis) en vue de promouvoir les aliments transformés. Pour bien faire connaître les aliments transformés canadiens sur ces marchés internationaux, on a présenté du matériel de publicité sur les lieux de vente, ainsi que des échantillons de ces produits.

L'industrie des articles de loisirs est toujours l'une des dernières à ressentir les effets de la récession économique et ces effets ne sont généralement pas aussi graves que dans le cas d'autres secteurs manufacturiers. Toutefois, en 1982, l'industrie a subi tout l'effet du ralentissement économique, et la valeur des expéditions en dollars courants a diminué de 1,6 % pour se chiffrer à 9,1 milliards de dollars. Les secteurs qui ont affiché les plus fortes baisses en 1982 sont les secteurs de l'enregistrement du son (baisse de 17 %) et les articles de sport (baisse de 11 %). Les secteurs des jouets, des jeux et de la production cinématographique ont enregistré une augmentation de 8 et de 7 % respectivement par rapport à 1981. Outre la production, le taux d'emplois de l'ensemble de l'industrie a baissé dans une proportion de 3 % pour s'établir à environ 142 000 personnes occupées. Selon les premiers indices relevés en 1983, le secteur commence à se remettre de la récession.

a eu recours au programme d'expansion des entreprises pour continuer de combler les besoins des secteurs en matière d'expansion industrielle. Les activités ont porté notamment sur la mise au point des produits et procédés, l'accroissement de la productivité et la restructuration des entreprises. Ainsi, en raison de la situation critique des pêches sur la côte Est, un certain nombre de garanties de prêts ont été approuvées pour faciliter la restructuration des activités de transformation du poisson. De plus, la direction a aidé les sociétés en vertu du programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre.

Les produits végétaux

La division a eu recours, dans une très large mesure, au programme des projets de promotion du ministère des Affaires extérieures pour l'accroissement et l'expansion des marchés du maïs, des grains fourragères, des pommes de terre de semence et des aliments pour animaux.

La division a organisé une visite pour une mission de représentants de compagnies de semences du Japon en septembre 1982, afin de promouvoir le Canada en tant que fournisseur éventuel de maïs hybride hâtif. La division a également invité des délégations techniques de l'Espagne, de la Hongrie et de Panama, spécialisées dans les pommes de terre de semence. La mission a donc permis aux fournisseurs canadiens de pénétrer de nouveau le marché de Panama, après plusieurs années d'absence, d'accéder au marché hongrois, ainsi que de renforcer la présence canadienne en Espagne.

Un représentant de la division a assisté aux réunions annuelles de l'OCDE portant sur les semences. Ce dernier était accompagné des représentants de Secan, de l'Association canadienne des producteurs de semences et d'Agriculture Canada. Au même moment, des représentants canadiens ont rendu visite à plusieurs organismes agricoles de la CEE, afin de recueillir des renseignements sur les exigences en matière d'essai et de licence en ce qui concerne les variétés de semences, ainsi que de trouver des marchés éventuels pour les variétés canadiennes.

Le ministère a appuyé deux projets de promotion d'entreprises au Japon par les producteurs de farine de luzerne déshydratée de l'Ouest canadien. Dans le secteur des aliments composés, la division a organisé, en collaboration avec l'Association canadienne des industries de l'alimentation animale, une mission à l'intention de détaillants d'aliments pour animaux provenant du Mexique.

l'hygiène ralentit, et certains projets ont été reportés à une date ultérieure; d'autres ont été mis en veilleuse ou annulés. Ces changements imprévus dans l'échelonnement des projets sont dus au fait que la diminution, à l'échelle mondiale, des demandes des produits de l'industrie des pâtes, des papiers et des cartons a occasionné une forte réduction de l'encaisse de l'industrie forestière canadienne. La Division des pâtes et papiers a entrepris une étude du programme aux termes de laquelle des mesures conjointes seront prises avec les provinces concernées en vue de faire face aux changements dans la situation économique. En outre, on a fait appel aux compétences de la division, en matière de technique et de commercialisation, pour l'étude et la mise en œuvre de nouveaux grands projets d'expansion industrielle au Canada, dans les secteurs des produits primaires et secondaires (transformation) de l'industrie.

La division a continué de prendre part aux activités des comités internationaux de développement, chargés de promouvoir l'échange des connaissances techniques et de favoriser le commerce et les investissements entre les pays, notamment le Japon, l'OCDE, Cuba et le Conseil de coopération douanière, un organisme multinational.

Au cours de l'exercice, la division a continué de mettre l'accent sur les produits du papier transformés et sur les matériaux d'emballage et s'est efforcée d'accroître les exportations de ces produits. En outre, un groupe d'experts-conseils a terminé, au début de 1983, son rapport sur les possibilités d'exportation des matériaux d'emballage sur le marché de la Californie.

LA DIRECTION GÉNÉRALE DE L'ALIMENTATION ET DES PRODUITS DE CONSOMMATION

Les industries des produits de consommation constituent un facteur économique important dans chaque province du Canada. La croissance des exportations revêt, depuis quelques années, de plus en plus d'importance d'autant plus que certains facteurs démographiques restent davantage la croissance dans certains secteurs. La direction s'efforce d'accroître les exportations ainsi que d'augmenter l'efficacité et la productivité des secteurs par le biais de la restructuration et de l'adaptation aux progrès technologiques en vue de maintenir et d'accroître leur compétitivité.

La direction a continué de promouvoir la PME-Alimentation en tant qu'outil à l'expansion et à l'accroissement des marchés d'exportation des produits alimentaires et agricoles. La direction

construction de l'Islande est venue rencontrer des compagnies de l'Est canadien. Les activités d'exportation ont suscité des ventes à l'exportation auprès de nouveaux acheteurs.

Les produits du bois manufacturés

Les fabricants canadiens de produits du bois ont continué de chercher des débouchés pour l'exportation de leurs produits, tout particulièrement sur les marchés des États-Unis et de l'Europe. La division a donc mis davantage l'accent sur les foires et les missions commerciales, ainsi que sur les demandes d'aide à la commercialisation présentées en vertu du PDME. La division a contribué à la promotion des produits du bois manufacturés lors de nombreuses expositions commerciales.

Malgré la grande importance accordée à la promotion des exportations, ces dernières ont diminué considérablement, passant d'un taux record de 450 millions de dollars en 1981 à environ 350 millions en 1982.

Certaines entreprises ont profité du faible niveau d'activité commerciale pour obtenir l'aide offerte en vertu du PEE afin de mettre au point de nouveaux produits et d'accroître l'efficacité de leurs activités. La division a appuyé de nombreux projets, dont le plus important a été l'élaboration d'une approche unique à la construction, au transport et à la mise en place de maisons préfabriquées.

L'ampleur des préoccupations mondiales touchant l'économie de l'énergie et la pénurie grandissante de bois ont amené les entrepreneurs à s'intéresser davantage à la technique canadienne de construction de maisons à charpente et à un large éventail de produits canadiens du bois manufacturés en vue de pénétrer de nouveaux marchés à l'étranger. À cet égard, la division a mené un certain nombre d'activités, en plus de celles déjà mentionnées, y compris une mission sur les fenêtres de bois provenant du Royaume-Uni et plusieurs missions sur les composantes de construction résidentielle provenant de la République fédérale allemande. Au chapitre de la coopération industrielle, la division a accueilli une mission composée de représentants d'organismes de normalisation et de recherche sur les produits du bois de sept pays de la Communauté économique européenne.

Les pâtes et papiers

La mise en œuvre du programme fédéral-provincial de modernisation de l'industrie des pâtes et papiers s'est poursuivie en 1982-1983, mais à un

La division a dirigé, en collaboration avec le ministère des Affaires extérieures, une mission Nouvelle-Zélande pour un vaste éventail de produits en métal ouvré. La mission a permis de repérer un certain nombre de possibilités de vente et de coentreprise, lesquelles ont été transmises à quelque 150 entreprises canadiennes aux fins de suivi immédiat.

La division a fourni une aide sectorielle pour l'organisation de la Foire canadienne des produits de construction et de la quincaillerie à Trinité. Cette foire a permis aux entreprises canadiennes de présenter leurs nouveaux produits et de promouvoir ceux déjà connus.

La Direction des produits forestiers

Les produits primaires du bois

La division administre conjointement avec le ministère de l'Expansion de la petite entreprise de la Colombie-Britannique et le Conseil des industries forestières de la Colombie-Britannique, le programme coopératif d'expansion des marchés d'outre-mer. Le programme vise l'expansion des marchés d'outre-mer pour le bois de construction résineux, le contre-plaqué et les bardeaux du Canada. Les exportations canadiennes à l'étranger sont passées de 245 millions de dollars en 1970, soit avant la première étape du programme, à 1,4 milliard en 1980, pour tomber ensuite à 1,1 milliard en 1982. La contribution du gouvernement fédéral au programme pour 1982-1983 s'est chiffrée à 1,9 million de dollars.

L'enquête du Département of Commerce des États-Unis, axée sur les droits compensateurs et touchant les exportations canadiennes de bois de construction résineux, de contre-plaqué et de bardeaux dans ce pays, a constitué l'un des principaux problèmes auxquels l'industrie a eu à faire face. À cet égard, la division a collaboré étroitement avec les autres ministères fédéraux et provinciaux et les groupes industriels intéressés afin d'appuyer l'industrie lors de cette enquête. Le résultat a été positif puisque le Canada a vu l'accès à son principal marché pour ces produits se maintenir.

Au cours de l'exercice, la division a organisé et mené à terme un grand nombre d'activités de promotion commerciale. Deux missions, dont l'une formée de producteurs de bois résineux et l'autre de représentants de l'industrie du bois feuillu, ont rendu visite à de grands importateurs et consommateurs de l'Europe de l'Ouest en vue d'accroître les ventes sur ce marché important. Une mission d'acheteurs de matériaux de

de réunions du comité où l'on a discuté des moyens d'enrayer la crise qui existe sur les marchés mondiaux de l'acier.

Les produits en métal ouvré et les matériaux de construction

La division a dû faire face à un nombre croissant de problèmes d'ordre commercial au cours de l'exercice. Le secteur canadien des produits en métal ouvré a encore été touché par l'accroissement de la concurrence en raison de l'entrée des pays nouvellement industrialisés sur le marché des importations de ces produits. Au cours de l'exercice, les importations des pays de la ceinture du Pacifique ont gagné une plus grande part du marché canadien, tout particulièrement en ce qui concerne les produits de pointe reconnus qui se vendent en grande quantité.

En réponse aux demandes du secteur privé, la division a organisé des groupes d'étude spéciaux de l'industrie chargés de discuter de problèmes particuliers. Ces discussions ont donné lieu notamment à la prise de mesures antidumping, ainsi qu'à la décision d'appuyer le ministère des Finances pour ce qui est d'étendre la compétence des douanes canadiennes à la zone de 200 milles. Cette dernière initiative a permis de rendre les mégaprojets au large des côtes plus accessibles aux fabricants et aux fournisseurs canadiens. Aux Etats-Unis, principal marché d'exportation pour les produits en métal ouvré et les matériaux de construction, les obstacles au commerce ont causé d'autres difficultés aux fabricants canadiens : le programme à prix réduits, remis en vigueur par les Etats-Unis, a découragé les importateurs de câbles en acier inoxydable; le Surface Transportation Assistance Act a empêché les fabricants canadiens de produits en ciment et en acier de participer aux projets de construction d'autoroutes financés par le gouvernement américain.

L'industrie canadienne de fabrication de produits en métal s'est également préoccupée de la création d'organisations, telles que la U.S. Metal Working Coalition. La division a consulté les sociétés concernées en vue de recueillir leurs réactions relativement à ces problèmes.

En juin 1982, la division a publié un répertoire détaillé de l'industrie canadienne de la fonte du fer et de l'acier, intitulé Répertoire des fonderies canadiennes de métaux ferreux, en vue d'aider les agents préposés aux achats et les ingénieurs à trouver des fournisseurs canadiens pour répondre à leurs besoins.

latine et de l'Europe et les exportations ont atteint près de 1,2 milliard de dollars. Le charbon à coke représente encore près de 90 % des exportations; toutefois, les exportations de charbon thermique augmentent et un volume considérable, provenant de Vancouver, est maintenant exporté au Japon, en Corée, à Hong-Kong et en Europe.

Au début de 1983, une étude du marché du charbon a été réalisée en Finlande, en Norvège, en Suède, en France, au Royaume-Uni et en Irlande. Un rapport important a ensuite été transmis aux représentants de l'industrie et des gouvernements.

La sidérurgie

Au chapitre de la situation économique et des marchés, l'année 1982-1983 a été la pire que l'industrie de l'acier ait connue depuis plus de trente ans. Comme l'industrie a dû couper ses dépenses et rationaliser ses activités en prévision du ralentissement de la demande sur les marchés, la plupart des demandes d'aide ministérielle portales sur des projets permettant d'offrir des prix plus concurrentiels et de mieux diversifier les produits. Certains de ces projets étaient axés sur des techniques de pointe, comme les générateurs d'arc au plasma et les nouvelles techniques de fabrication de l'acier, dont la mise au point pourrait prendre plusieurs années. Un projet, qui a permis à un fabricant canadien de développer les marchés d'exportation de matériel de défense, était en cours d'exécution au début de 1983-1984. La division a exploré les possibilités d'expansion des marchés et a notamment examiné deux demandes d'aide présentes par l'industrie afin d'effectuer des études de marché en vue d'accroître la capacité des régions d'exploiter les possibilités en matière de remplacement des importations ou d'exportation. La division a également entrepris des analyses de l'industrie et du marché, dont une étude de faisabilité préliminaire portant sur la fabrication de barres et de fils machine dans l'Ouest canadien.

La division a réglé un large éventail de questions portant sur les relations commerciales. Les importations d'acier négociées inéquitablement, dans de nombreux cas à des niveaux préjudiciables aux producteurs canadiens, ont donné lieu à de nombreuses enquêtes portant sur les mesures antidumping.

La division a continué de collaborer étroitement avec le groupe d'étude du Comité de l'acier de l'Organisation de coopération et de développement économique (OCDE) et a assisté à un certain nombre

LA DIRECTION GÉNÉRALE DES INDUSTRIES DE TRANSFORMATION DES RICHESSES NATURELLES

Cette direction générale regroupe les produits chimiques, les produits du bois, ainsi que les métaux et les minéraux. En 1982, les livraisons effectuées par les industries de transformation ont totalisé 68 milliards de dollars. Les exportations se sont chiffrées à 31 milliards de dollars et les importations à 15 milliards de dollars.

La Direction des produits chimiques

Les matières plastiques, le caoutchouc et les produits chimiques spéciaux

Bien que la situation économique ait été défavorable en 1982-1983, la valeur des exportations des industries de résines synthétiques et de produits en matière plastique a augmenté de 3 % par rapport à l'année précédente. Les importations ont diminué de 8,5 %, de sorte que le déficit de la balance commerciale a été réduit de 144 millions de dollars ou de 11,5 %.

On a accordé une aide financière en vue d'établir un Institut canadien des plastiques chargé d'aider l'industrie des plastiques à se tenir au fait des progrès technologiques, à augmenter sa productivité et à continuer de créer beaucoup d'emplois.

Le pétrole et les produits chimiques industriels

Le groupe d'étude interministériel de l'industrie pétrochimique a terminé son rapport en octobre 1982. Par la suite, le gouvernement a annoncé qu'il offrirait une aide à court terme à deux producteurs de l'industrie pétrochimique, en attendant l'élaboration d'une politique à long terme pour l'industrie. Le ministre a nommé un groupe d'étude de l'industrie et de la main-d'œuvre chargé d'élaborer des recommandations pour une politique à long terme.

La Direction des produits chimiques a pris part aux réunions du groupe international d'étude du caoutchouc (GIEC), à l'intérieur duquel les producteurs et les consommateurs de caoutchouc naturel et synthétique peuvent échanger des renseignements. Le Canada est un producteur important de caoutchouc synthétique.

En tant que membre du conseil d'administration, la direction a continué de prendre part aux activités du Sulphur Development Institute of Canada (SUDIC), organisme à but non lucratif qui encourage la recherche sur de nouvelles utilisations du soufre.

Les produits d'hygiène

La Conférence internationale sur la technologie du matériel médical dans les années 80, par ailleurs conjointement par le ministère, Santé et Bien-être social Canada et l'Association canadienne des fabricants de matériel médical, a eu lieu à Toronto en décembre 1982.

Dans le cadre du programme visant à assurer aux producteurs canadiens une plus grande part du marché intérieur, le ministère a organisé une exposition des produits d'hygiène fabriqués au Canada, laquelle exposition a été tenue en même temps que la conférence sur le matériel médical. Plus de cent compagnies ont présenté leurs produits fabriqués au pays. L'un des intérêts particuliers de cette exposition a été la présentation du matériel médical de pointe provenant de laboratoires d'hôpitaux, de centres biomédicaux et de laboratoires de recherche universitaires au Canada.

Au cours de l'année, la direction a organisé des expositions de produits d'hygiène canadiens à Tokyo et au Centre canadien de commerce à

La Direction des métaux et minéraux

La transformation des métaux et minéraux

La division a dirigé une délégation canadienne qui a assisté aux réunions du groupe international d'étude du plomb et du zinc pour discuter de la situation des marchés mondiaux de ces métaux; en outre, elle a assigné des représentants au sein des délégations canadiennes qui ont assisté aux réunions du Comité de la CNUCED sur le tungstène et la bauxite; elle y a fait fonction de conseiller en matière de commercialisation et de transformation supplémentaire.

La division a participé activement au développement des marchés à l'intention de l'industrie du charbon, qui a continué à étendre et à diversifier ses marchés en 1982-1983. Des produits provenant de la Colombie-Britannique, de l'Alberta et de la Nouvelle-Écosse ont été exportés dans 18 pays de l'Asie, de l'Amérique

s'en servent également pour trouver des fournisseurs canadiens.

BIENS DE CONSOMMATION,
SERVICES ET
TRANSFORMATION DES
RICHESSES NATURELLES

Le groupe des biens de consommation, des services et de la transformation des richesses naturelles (GBCSRN) comprend huit éléments de la structure organisationnelle du MIC :

- Direction générale de la transformation des richesses naturelles;
- Direction générale des produits chimiques;
- Direction générale de l'alimentation;
- Bureau des industries de services;
- Direction générale des textiles et des produits de consommation;
- Bureau de commercialisation des grains;
- Design Canada;
- Bureau des priorités du programme d'aide à l'adaptation de l'industrie de la main-d'œuvre (PAAIM).

A la fin de l'année financière, ces éléments ont été fusionnés dans une nouvelle structure organisationnelle composée de six directions générales :

- Industries de transformation des richesses naturelles (y compris les produits chimiques);
- Industries de services;
- Industries de l'alimentation et des produits de consommation;
- Bureau de l'adaptation industrielle (y compris les textiles, l'habillement et la chaussure, le design et le programme PAAIM);
- Politique, planification et analyse;
- Bureau de commercialisation des grains.

Le nombre des directions générales est passé à cinq le 4 mars 1983, date du transfert de la Direction générale de la commercialisation des grains au ministère des Affaires extérieures.

Dans les chapitres qui suivent, les activités de ces directions générales entreprises en 1982-1983 sont étudiées, à l'exception de la Direction générale de la politique, de la planification et de l'analyse qui était en cours d'organisation à la fin de l'exercice financier.

de Beaufort, dans l'Extrême-Arctique et au large de la côte Est, ainsi que sur un projet de valorisation et un programme de production pétrolière conventionnel. Ces réunions, ainsi que de nombreuses rencontres officielles entre les fonctionnaires du bureau et les promoteurs de grands projets, ont permis d'accroître les débouchés offerts aux fournisseurs canadiens. A l'instigation du bureau, un nombre croissant de promoteurs ont commencé à établir des politiques d'achat qui tiennent compte de la capacité de concurrence des firmes canadiennes.

LA DIRECTION GÉNÉRALE DU DÉVELOPPEMENT DES MARCHÉS

La Direction générale du développement des marchés est responsable, dans l'ensemble du ministère, de la commercialisation au Canada, et a également des responsabilités précises en matière de commercialisation dans le secteur des biens d'équipement et des biens industriels. La direction générale coordonne les initiatives du secteur et les initiatives du ministère dans les régions et entreprend des activités horizontales en vue d'augmenter la part du marché canadien occupée par l'industrie.

Afin de donner plus d'ampleur au programme Magasins à la canadienne, la direction générale y intégrera le programme des débouchés commerciaux canadiens qui aide le secteur privé à trouver des sources d'approvisionnement, et le programme des marchés institutionnels, qui fait connaître à l'industrie les débouchés qu'offrent les achats dans le secteur public (notamment dans les hôpitaux, les établissements d'enseignement, etc.), ainsi que d'autres activités ministérielles.

La direction générale fournit également des analyses d'importation par le truchement de la Division de l'analyse des importations (DAI) et des comparaisons interassociées par sa Division de l'amélioration de la productivité (DAP). En 1982-1983, la direction générale a effectué 24 analyses portant sur des importations d'une valeur de plus de 300 millions de dollars. Des études de productivité ont été effectuées pour 200 entreprises dans dix secteurs différents. La direction générale exploite le système de repérage des débouchés (SRD), qui possède des listes pour quelque 14 000 entreprises. Les délégués commerciaux en poste à l'étranger utilisent le service pour trouver des fournisseurs canadiens en mesure de tirer parti de débouchés à l'exportation. Les gouvernements provinciaux, les chambres de commerce et les entreprises privées

LE BUREAU DES RETOMBÉES INDUSTRIELLES ET RÉGIONALES

productivité et la compétitivité et mieux faire connaître aux facultés universitaires les besoins et les débouchés industriels actuels.

Le Bureau des retombées industrielles et régionales a été créé en vue d'aider les entreprises canadiennes à tirer pleinement parti des possibilités offertes par les grands projets réalisés au Canada. Le bureau a désigné comme étant prioritaires des projets d'une valeur globale de 100 milliards de dollars. Il a mis en application diverses méthodes qui permettront aux entreprises canadiennes de fabrication et de services qui sont concurrentielles d'accéder pleinement à ces projets et à d'autres.

Le bureau est chargé de la consultation et des échanges avec le secteur privé sur les questions industrielles et régionales liées aux grands projets. Il collabore étroitement avec les gouvernements provinciaux en ce qui a trait aux retombées industrielles et, par le truchement de l'Administration du pétrole et du gaz des terres du Canada, conseille le gouvernement fédéral en ce qui touche les dispositions relatives aux retombées industrielles de la loi sur le pétrole et le gaz naturel du Canada.

Le bureau consulte les propriétaires et les promoteurs de projets d'investissement pour que les entreprises canadiennes soient en mesure d'exploiter pleinement et équitablement les possibilités qu'offrent de tels projets. Il encourage les promoteurs des projets à établir des politiques d'achat conformes aux objectifs du gouvernement en matière de retombées industrielles organisationnelles convenables pour l'application de ces politiques. Il contribue à déterminer les secteurs où la capacité canadienne est la plus concurrentielle, ainsi que les secteurs méritant d'être mis en valeur par les promoteurs en raison du potentiel qu'ils représentent.

Le bureau fournit au Comité des retombées industrielles et régionales des mégaprojets des analyses et un soutien administratif. Composé de représentants des gouvernements provinciaux et territoriaux, et d'autres ministères fédéraux, ce comité offre une tribune plus vaste pour la consultation avec les promoteurs des projets. Au cours de l'année, il a tenu quatorze réunions avec des promoteurs de travaux d'investissement. Les projets étudiés portaient notamment sur l'exploitation pétrolière et gazière dans la mer

LA DIRECTION GÉNÉRALE DE LA TECHNOLOGIE

Le ministère a joué un rôle clef en participant aux discussions qui ont permis à des entreprises canadiennes de présenter des soumissions en vue de fournir du matériel d'une valeur de plus de 500 millions de dollars pour le réseau de transport en commun de Singapour. Après une présélection, les entreprises canadiennes sont toujours dans la course.

Au cours de l'année, un institut de recherche industriel (IRI), cinq centres de technologie de pointe (CIP) et trois associations de recherche industrielle (ARI) ont reçu des contributions dans le cadre du programme d'aide aux institutions du ministère. Ce programme a pour but d'encourager les universités, les organismes provinciaux de recherche et les groupes industriels à acquérir la capacité d'entreprendre des travaux de recherche et de développement pour l'industrie et de lui fournir des conseils et des services techniques. En 1982-1983, un nouveau CIP a été créé, l'Atlantic Coal Institute à l'université du Cap-Breton, et une nouvelle ARI, le Canadian Plastics Institute de Toronto. Ces derniers s'ajoutent aux sept IRI, aux six CIP et aux quatre ARI déjà créés dans le cadre du programme et qui sont actuellement financièrement autonomes, grâce aux revenus qu'ils tirent de la prestation de services à des entreprises industrielles et à d'autres clients.

Le ministère a, en outre, fourni une aide financière à deux centres d'innovation. L'un d'eux est affilié à l'université de Waterloo et l'autre à l'École polytechnique de Montréal. Ces centres évaluent des inventions, aident à la commercialisation de nouveaux produits et favorisent l'établissement de nouvelles entreprises axées sur la technologie.

Dans le cadre du programme d'études sur les innovations technologiques, des subventions ont été accordées à quinze chercheurs universitaires pour entreprendre des études dans des domaines tels que les techniques de gestion du transfert technologique dans la petite entreprise, la biotechnologie et les débouchés économiques qui s'offrent au Canada, ainsi que les obstacles à l'automatisation dans l'industrie manufacturière. Plusieurs études de cas détaillées portant sur des entreprises axées sur la technologie ont également été mises au point pour permettre de mieux comprendre la gestion de l'innovation technologique. Le ministère utilise les résultats de ces travaux pour élaborer des politiques, promouvoir l'innovation industrielle dans l'industrie canadienne, augmenter la

L'industrie de la construction et de la réparation de navires a connu un ralentissement marqué, attribuable à la conjoncture mondiale, et les commandes ont graduellement diminué. Dans les chantiers maritimes, les mises à pied ont été nombreuses et souvent massives. Les manufacturiers de pièces de bateau ont également souffert de la diminution des commandes.

Le programme d'aide aux constructeurs de navires (PACN) se poursuit et des subventions sont offertes pour tous les navires terminés avant le 1^{er} juillet 1985. Les nouvelles demandes ont été peu nombreuses en raison de l'absence de nouveaux contrats.

Une aide au développement de marchés a été accordée. Pour ce faire, on a organisé des stands nationaux à la Conférence sur la technologie off-shore qui a eu lieu à Houston, au Texas, à l'Offshore Northern Seas tenue à Stravanger, en Norvège, au Salon International de l'Océanologie organisé à Brighton, en Angleterre. Par ailleurs, on a tenu des stands d'information à un certain nombre d'autres foires internationales.

En ce qui concerne les retombées industrielles issues de l'approvisionnement gouvernemental, la direction a participé aux activités du bureau d'administration du programme créé pour l'acquisition de la frégate de patrouille canadienne en s'occupant de la gestion des retombées industrielles.

La Division du transport ferroviaire

Bien que la demande ait continué d'être faible au Canada dans le secteur de l'approvisionnement en matériel ferroviaire, le ministère a poursuivi ses efforts pour exploiter des marchés d'exportation. Des missions commerciales de visiteurs et de délégués ont été organisées ou subventionnées dans des marchés éventuels importants, et les demandes d'aide aux termes du PDME ont augmenté.

Entre autres succès commerciaux importants, citons les ventes financées par la SEE et l'ACDI en Indonésie et au Brésil (50 millions de dollars pour chaque pays). Des entreprises canadiennes sont passées près de décrocher un contrat de 477 millions de dollars pour des locomotives, une aide technique et de la construction en Algérie et un protocole bilatéral sur le transport ferroviaire est en cours. Des entreprises canadiennes ont également des chances de décrocher des contrats d'une valeur de 400 millions de dollars avec le Nigeria dans ce secteur.

A cet égard, le principal projet de recherche et de développement a été la mise au point de la

locomotive diesel Bombardier qui fait appel à la technologie de pointe. Ce projet de 54 millions de dollars, étalé sur sept ans et instauré dans le cadre du programme d'expansion des entreprises, se déroule selon le calendrier établi.

On a créé, de concert avec les bureaux régionaux, plusieurs projets de conception de matériel ferroviaire. On a notamment envisagé la possibilité de mettre au point une voiture de contrôle de l'état géométrique de la voie, du matériel plus efficace pour l'enlèvement de la neige, ainsi qu'une dégarnisseuse-cribleuse à haute vitesse et un nettoyeur de ballast.

Entre autres projets, la division a poursuivi son travail avec l'industrie et d'autres ministères au chapitre de l'électrification des chemins de fer. On a amorcé la construction d'une ligne de chemin de fer électrifiée en Colombie-Britannique et entrepris la fabrication de locomotives électriques.

La Division du transport urbain

Les efforts déployés par les fabricants canadiens de matériel de transport urbain ont continué d'être très fructueux tant sur le marché intérieur qu'extérieur. Leur chiffre d'affaires, au cours de l'exercice, a atteint environ 2,5 milliards de dollars. La direction a continué de participer activement à la promotion des exportations en parallèle des foires commerciales et d'autres activités. Les exportateurs ont reçu de l'aide aux termes du PDME et le développement industriel a été favorisé grâce à l'aide accordée en vertu du PEE, notamment dans le cas de l'Ontario Bus Industries qui a décidé de mettre au point un autobus de dimensions réduites.

L'aide fournie par la direction en matière de commercialisation a nettement favorisé plusieurs percées importantes de l'industrie sur les marchés d'exportation. Les fabricants ont obtenu des commandes importantes de Detroit et de Chicago pour des voitures de métro et des autobus. En outre, le gouvernement fédéral a aidé la société Bombardier à décrocher un contrat de 700 millions de dollars pour la fabrication de voitures de métro destinées à la ville de New York. Il s'agit de la vente la plus importante réalisée par le Canada dans le domaine de la technologie des

L'industrie de l'électronique participe toujours activement au programme de développement des marchés d'exportation (PDME). On a aidé de nombreuses petites et moyennes entreprises à trouver des marchés pour leurs produits à l'étranger et à y faire une percée.

Au cours de l'année, la direction a aidé des Canadiens à participer à un certain nombre de foires et de missions internationales clés. Les deux salons commerciaux les plus importants dans les sous-secteurs de l'informatique et de l'automatisation de bureau ont été la National Computer Conference de la Californie et le SICOB à Paris. Pour ce qui est des produits de consommation, les manufacturiers canadiens ont reçu une aide pour participer à la foire commerciale mondiale Domotecnica en République fédérale allemande.

Or a également aidé l'industrie à commercialiser ses exportations en parrainant des missions commerciales dans des pays offrant de nombreux débouchés pour les produits canadiens.

LA DIRECTION GÉNÉRALE DU TRANSPORT ROUTIER, MARITIME ET FERROVIAIRE

La Direction de l'automobile

Malgré les sévères difficultés qu'a connues l'industrie canadienne de l'automobile, attribuable à la récession continue sur le marché américain clé et à une concurrence internationale acharnée, les constructeurs d'automobiles du Canada ont investi plus que jamais auparavant dans la construction d'usines et dans l'achat de matériel. A la fin de l'année financière, les ventes de véhicules ont repris après avoir atteint, en 1982, le niveau le plus bas enregistré depuis dix ans. Cette année-là, les fabricants d'automobiles ont considérablement réduit leurs stocks, les seuls de rentabilité ont été abaisssés et l'industrie a entrepris le dernier trimestre de l'année financière avec un calendrier de production plus important qu'il comportait une diminution du nombre de travailleurs mis à pied.

Le ministre a envoyé une délégation au Japon afin d'amorcer, avec le gouvernement de ce pays, des discussions sur la coopération industrielle, tentant ainsi d'obtenir que les Japonais s'engagent à investir davantage au Canada et à compter à des fournisseurs canadiens la fabrication de leurs pièces. Les fonctionnaires du ministère ont poursuivi leurs discussions avec le Japon relativement aux restrictions à l'exportation. En août 1982, le gouvernement japonais a annoncé son intention de limiter à 63 000 ses exportations de voitures particulières

entre le 1^{er} juillet et le 31 décembre 1982, portant ainsi à 153 000 le nombre de voitures exportées au cours de l'année civile. En février 1983, les gouvernements japonais et canadien ont conclu une entente provisoire en vertu de laquelle les exportations de voitures particulières japonaises seraient limitées à 79 000 au cours de la période comprise entre le 1^{er} janvier et le 30 juin 1983.

En décembre 1982, un groupe de travail du secteur privé sur l'industrie canadienne des véhicules et des pièces d'automobile a été créé. Le ministère y a participé d'office.

Le groupe de travail a été constitué pour étudier le développement et la position concurrentielle de l'industrie des manufacturiers canadiens d'automobiles et pour faire des recommandations en vue d'aider le gouvernement à déterminer des priorités et à formuler des politiques à l'appui des initiatives de l'industrie, contribuant ainsi à rendre le Canada plus compétitif à ce chapitre.

La direction générale a étudié les demandes d'aide qui lui ont été adressées aux termes du programme de fabrication de pièces d'automobile lancé l'année précédente dans le cadre du PAI/M.

La direction générale a fait la promotion des débouchés à l'exportation auprès des manufacturiers canadiens de pièces d'automobile et de véhicules et s'est efforcée de promouvoir les entreprises en coparticipation afin d'augmenter les exportations. Elle a également parrainé des missions commerciales et participé à des foires commerciales. Le programme de remise de droits de douane qu'elle administre a appuyé les efforts accomplis dans le secteur des pièces d'automobile.

A la suite des activités de promotion des investissements entreprises par la direction générale, la Toyota Motor Corporation a annoncé l'établissement d'une usine de roues d'automobiles en aluminium dans la zone industrielle de Tilbury Island en Colombie-Britannique. Cette usine constitue le premier investissement au Canada d'un manufacturier japonais de véhicules et représente une mise de fonds de 23 millions de dollars.

La Direction du transport maritime, ferroviaire et urbain

La Division des systèmes maritimes

Le niveau d'activité dans les industries océaniques a été stable. En effet, l'exploration s'est poursuivie dans la mer de Beaufort et au large des provinces de l'Atlantique. Toutefois,

LA DIRECTION GÉNÉRALE DE L'ÉLECTRONIQUE ET DE L'AÉROSPATIALE

La Direction de l'aérospatiale

Le secteur de l'aérospatiale a enregistré des ventes d'environ 3 milliards de dollars au cours de l'année civile 1982. L'emploi a quelque peu diminué par rapport aux niveaux enregistrés précédemment. L'industrie a continué d'être principalement liée aux marchés d'exportation (environ 80 % de la production), poursuivant ainsi sa contribution notable à la balance commerciale du Canada.

Les négociations se sont poursuivies dans le cadre du GATT en vue d'augmenter le nombre d'articles d'aérospatiale pouvant être admis en franchise aux termes de l'Accord sur le commerce des aéronefs civils.

La direction a participé à un certain nombre d'entreprises importantes, notamment : l'analyse des possibilités d'établissement d'une usine de fabrication d'hélicoptères au Canada; l'élaboration d'une entente générale à long terme avec la Pratt & Whitney Canada; et les activités du Comité consultatif de développement de l'aérospatiale relevant du ministre.

Dans le cadre du programme de productivité de l'industrie du matériel de défense, l'aide financière accordée à ce secteur de l'industrie au titre de la recherche et du développement, de l'établissement de sources d'approvisionnement et de la modernisation d'usines a continué d'être une activité importante, puisque près de 58 millions de dollars ont été affectés à 57 projets.

Un comité interministériel réuni par la direction a examiné les usagers éventuels des dirigeables au Canada. Plusieurs suggestions font actuellement l'objet d'un examen plus approfondi et un dirigeable destiné à être mis à l'essai par la marine américaine a été construit près de Toronto.

Des efforts ont été déployés pour déterminer si de nouveaux débouchés industriels pouvaient être explorés pour redresser la balance déficitaire du Canada au chapitre des avions légers et une aide soutenue a été accordée aux entreprises déjà en activité dans ce secteur du marché.

La direction a participé à des projets d'étude du programme Dash 8 et de formulation d'un programme fédéral-provincial visant à fournir une flotte d'avions-citernes CL-215 qui seront utilisés au Canada. On a entrepris des projets de coopération avec l'aviation américaine en vue de mettre au

point un avion à coussins d'air, ainsi qu'avec la technologie de l'avion à décolage et à atterrissage courts (ADAC) à la prochaine génération d'avions d'attaque.

En ce qui concerne les programmes existants, citons, entre autres, les essais de vol et les démonstrations de l'avion de transport Buffalo à portance assistée devant des exploitants militaires. De plus, on a intensifié les efforts en vue de trouver un partenaire étranger pour un programme de mise au point et de production d'avions de transport à réaction ADAC, et on a entrepris la mise au point d'un aéronef léger triplable à coussin d'air et terminé un programme de faisabilité prévu pour juillet 1983.

On a amorcé la mise au point, le démarrage et la production du système téléguîdés CL-289, de concert avec l'Allemagne de l'Ouest et la France.

La Direction de l'électronique

Au chapitre des produits électroniques, la diminution de la demande a entraîné une croissance de moins de 6 % des exportations de l'industrie, ce qui constitue une baisse par rapport aux taux de croissance annuels de plus de 20 % enregistrés au cours des trois dernières années. En revanche, les exportations de l'industrie ont augmenté à un rythme plus rapide que les importations de sorte que les déficits commerciaux élevés enregistrés pour plusieurs produits ont en fait diminué au cours de l'année. Les sous-secteurs des télécommunications et de l'aviation-défense ont connu des résultats impressionnants sur le plan commercial, terminant chacun l'année avec une augmentation des exportations de plus de 33 % par rapport à l'année précédente.

La Direction de l'électronique a continué d'aider l'industrie grâce à une gamme étendue de mécanismes. Le programme d'aide à l'accroissement de la productivité au moyen de techniques (PAAPT), lancé au début de 1982, a fourni une aide financière visant à stimuler la mise au point et l'utilisation de techniques d'électronique de pointe dans les industries de la fabrication, de la transformation et des services au Canada. Deux nouveaux centres de micro-électronique (centres de technologie de pointe) ont ouvert leurs portes dans la région des Maritimes, portant à sept le nombre de ces centres au Canada. Les centres serviront de points centraux pour la diffusion de l'information sur la technologie de la micro-électronique et ses applications.

* l'aide au programme fédéral-provincial de modernisation de l'industrie des pâtes et papiers;

* la détermination des débouchés industriels issus du projet de remplacement des armes portatives.

L'adaptation sectorielle

La récession a entraîné de sérieux problèmes d'adaptation dans le secteur de la machinerie et du matériel électrique. En 1982-1983, les secteurs qui ont enregistré les baisses les plus marquées étaient notamment : la machinerie agricole; le matériel de transformation des ressources naturelles dont le matériel

d'exploitation forestière et minière; les machines-outils; et certains types de matériel utilisés dans les industries de services comme le matériel de réfrigération commercial et de plomberie, et la quincaillerie. La direction a aidé des entreprises à restructurer leurs activités de façon à améliorer leur potentiel de croissance à long terme. Voici quelques-unes des activités entreprises :

* des initiatives visant la conclusion d'ententes de rationalisation et de spécialisation de la fabrication de produits comme les presses mécaniques, le matériel de peinture au pistolet, les rognoirs pour l'herbe, les climatiseurs pour salles d'ordinateur, les outils de jardinage et les machines à étiqueter;

* l'évaluation technique et commerciale de 20 projets, y compris des projets d'agrandissement et de modernisation d'usines, de construction de nouvelles installations de production, aux termes du programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre (PAAIM);

* la surveillance et l'évaluation des activités déboulant du décret de remise de droits de douane sur les chargées à bonne frontière et de leur incidence sur la production et l'exportation de ces produits au Canada;

* les activités liées à l'aide accordée par le gouvernement fédéral à plusieurs manufacturiers de machines et de matériel énergétique électrique faisant l'objet d'une réorganisation majeure, ainsi que l'évaluation de treize demandes d'aide à l'adaptation dans le cadre du programme d'expansion des entreprises.

Le matériel énergétique

La Division de l'équipement électronique de la Direction générale de la machinerie et de l'équipement électrique et la Division du matériel d'énergie et d'environnement ont été intégrées à la nouvelle Division du matériel énergétique. Celle-ci s'occupe du matériel électrique nécessaire à l'exploitation du pétrole et du gaz et à la production, la transmission et la distribution de l'électricité. La division a en outre favorisé l'expansion des marchés d'exportation et participé à un certain nombre de missions commerciales.

L'innovation

Au cours de l'année, la direction a évalué 45 cas aux termes du programme d'expansion des entreprises.

L'analyse et l'élaboration de politiques

Au nombre des activités entreprises dans ce domaine, citons l'évaluation des mises à pied à court terme dans l'industrie de la machinerie et du matériel énergétique électrique au Canada, l'établissement d'une stratégie à l'intention de l'industrie de la machinerie pour les années 80, la rédaction d'un document de synthèse visant les petites entreprises de l'industrie des machines, l'élaboration de propositions de politiques concernant le matériel spécialisé d'exploitation minière au Canada, ainsi que l'établissement d'un plan d'expansion des exportations canadiennes pour chaque pays portant sur certains articles de machinerie importants et d'un aperçu général de l'industrie de la machinerie.

La promotion des exportations

La direction met en œuvre un programme dynamique de promotion et de coopération visant à aider les entreprises à tirer davantage profit des marchés d'exportation. Ces activités ont englobé :

* l'approbation de cent demandes aux termes du programme de développement des marchés d'exportation (PDME);

* la participation de ses représentants à quinze foires commerciales et à vingt-trois missions commerciales et l'organisation de la participation de ces manifestations.

• aider les utilisateurs de machinerie à acheter du matériel de production perfectionné au plus bas prix possible, par le truchement de remises de droits de douane sur l'équipement ne pouvant être fabriqué au Canada.

La direction générale a entrepris une étude permanente des capacités de fabrication de machinerie du Canada afin d'évaluer les demandes de remises de droits de douane de l'industrie.

En 1982-1983, 17 000 demandes de remise de droits de douane ont été évaluées aux termes du programme de la machinerie. Les utilisateurs de machinerie de toutes les industries ont réalisé, grâce à ces remises de droits, des économies nettes d'environ 300 millions de dollars. Des remises de droits sur les biens d'équipement et les éléments de production utilisés pour mettre au point de nouvelles capacités de fabrication et installer des chaînes de production intégrées et destinées à servir aux manufacturiers de pièces d'automobile, ont été accordées à plus de 300 entreprises du secteur de la machinerie et d'autres secteurs de l'industrie canadienne. De plus, ces remises ont permis aux manufacturiers d'économiser 32,5 millions de dollars en coûts d'immobilisation et ont contribué à augmenter la production canadienne de 1,1 milliard de dollars et à créer environ 13 000 nouveaux emplois directs.

Au cours de l'année financière, le programme de la machinerie a aidé 36 entreprises à augmenter leur gamme de produits fabriqués au Canada. Il a aussi permis d'amorcer la production de 34 nouvelles séries de produits jusqu'alors importés, entraînant une augmentation annuelle des activités manufacturières se chiffrant à 86,7 millions de dollars et la création de plus de 700 emplois.

Les retombées industrielles des débouchés offerts par le marché intérieur

La direction a répéré des débouchés commerciaux et a contribué à renforcer les capacités d'approvisionnement des fournisseurs canadiens de machines et de matériel électrique. Cette activité a englobé :

- l'appui au Comité sur les retombées industrielles et régionales des mégaprojets;
- l'appui au ministère des Approvisionnements et Services (MAS) dans l'évaluation des achats de machines et de matériel excédant 2 millions de dollars afin de déterminer des fournisseurs canadiens éventuels;

Le secteur des biens d'équipements et biens industriels est formé de cinq directions générales d'exploitation :

- Machinerie et équipement électrique
- Electronique et aérospatiale
- Transport routier, maritime et ferroviaire
- Bureau des retombées industrielles et régionales
- Développement des marchés

Les activités de la Direction de la technologie ont été confiées à d'autres centres de responsabilité.

LA DIRECTION GÉNÉRALE DE LA MACHINERIE ET DE L'ÉQUIPEMENT ÉLECTRIQUE

La production totale de l'industrie canadienne de la machinerie et de l'équipement électrique est passée de 10,8 milliards de dollars en 1981-1982 à 9,6 milliards de dollars en 1982-1983, ce qui constitue une baisse de 11 % en termes réels. En moyenne, les taux d'utilisation de la capacité dans l'industrie ont été extrêmement réduits en 1982-1983, soit 70 % par rapport à 82 % l'année précédente. La production a diminué dans presque tous les secteurs, parfois très peu, parfois beaucoup. Les exportations de machinerie et d'équipement ont également diminué de 8 % par rapport aux niveaux de 1981-1982, pour s'établir à 3,9 milliards de dollars, et l'ensemble du marché canadien a enregistré une baisse de 18 % passant de 18,6 milliards de dollars en 1981-1982 à 15,3 milliards de dollars.

L'étude des principaux secteurs d'activité de la Direction générale de la machinerie et de l'équipement électrique en 1982-1983 porte sur les programmes suivants :

Le programme de la machinerie

Ce programme a continué de représenter une activité importante de la direction. En vertu de ce programme, une subvention est accordée pour le développement industriel. Son objectif comprend les deux volets suivants :

- Inciter les manufacturiers de machinerie à tirer le maximum de profit des dispositions tarifaires; et

LÉS ACTIVITÉS DANS LA RÉGION DE LA CAPITALE NATIONALE

Pour plus de clarté, les principales activités des ministères en voie de fusionnement ont été regroupées selon l'emplacement bien qu'il y ait habituellement une grande interaction entre les divers éléments.

RAPPORTS ANNUELS 1982-1983

Ministère de l'Industrie et du Commerce
et
Ministère de l'Expansion économique régionale

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Expansion industrielle
régionale
Regional Industrial
Expansion

Ministre
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Expansion industrielle
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Minister
Sinclair Stevens

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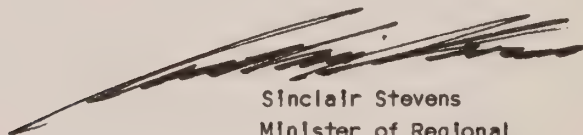
Her Excellency
The Right Honourable Jeanne Sauvé, P.C., C.C., C.M.M., C.D.
Governor General of Canada

Your Excellency:

I have the honour to submit to Your Excellency the combined final Annual Reports for the Departments of Regional Economic Expansion and Industry, Trade and Commerce and the first Annual Report for the new Department of Regional Industrial Expansion.

Your Excellency, you will find in this report, under appropriate headings, a summary of the accomplishments of the departments.

Respectfully submitted,

A handwritten signature in dark ink, appearing to read 'Sinclair Stevens', with a long, sweeping horizontal stroke extending to the left.

Sinclair Stevens
Minister of Regional
Industrial Expansion

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INTRODUCTION

The fiscal year 1983-84 marked the formal inauguration of the Department of Regional Industrial Expansion and the passage by Parliament of legislation creating the department's Industrial and Regional Development Program.

The new, and completely reorganized, department was the ultimate result of the government's decision in 1982 to merge elements of the former Departments of Industry, Trade and Commerce (IT&C) and Regional Economic Expansion (DREE) into a single entity combining the Industry sector experience of IT&C with DREE's knowledge and experience of regional delivery of federal economic assistance programs.

The reorganization saw the Ottawa office grouped into six units, each under the direction of an Assistant Deputy Minister or equivalent, plus five service units: Human Resources; Communications; Internal Audit; Legal Services; and Corporate Coordination Bureau.

Strong regional and district offices, headed by Regional Executive Directors, were established in each province and territory to ensure local sensitivity in program delivery and development.

The IRDP legislation consolidated into a single package elements of seven former DREE and IT&C programs, providing clients with a simpler, more streamlined program designed to provide "one-stop shopping" for Canadian businesses.

Thus, the 1983-84 fiscal year, as is reflected in the following text, saw the department administering the old programs as well as the new IRDP.

Although the new department did not come into official existence until approximately the mid-point of the fiscal year, this annual report has been organized to reflect the organization as of March 31, 1984, in order to simplify its presentation.

However, in accordance with Parliamentary requirements, financial statements for all three departments are shown separately.

NATIONAL CAPITAL ACTIVITIES

The major activities of the new department have been described by responsibility centre in the interest of clarity although it is noted that considerable interaction among the various elements normally occurred.

CAPITAL AND INDUSTRIAL
GOODS

The final phase of reorganization was implemented over the course of the fiscal year. The reorganization comprised: first, the transformation of four industry sector branches and the Bureau of Business and Economic Development into three branches (Electronics and Aerospace; Automotive, Marine and Rail; and Machinery and Electrical Equipment), creation of the Office of Industrial Innovation and restructuring of the Office of Industrial and Regional Benefits to include responsibility for Industrial benefits from major government procurement; second, a compression of resources (from a starting point of about 400 persons to just over 300); and, third, a major shift in mandate towards a more strategic approach to activities in support of industrial sector and company development.

The Market Development Branch was transferred to Consumer Goods, Services and Resource Processing.

As restructuring, restaffing, and orientation to its new mandate proceeded, CIG branches endeavoured to maintain the quality and quantity of output in relation to their ongoing baseload of activity, much of which was non-discretionary and reactive to the needs of business, other departments, and Ministers.

These activities included maintenance of sectoral intelligence, maintenance of expertise on technology and innovation, provision of inputs to departmental policy positions, export marketing activities (e.g. fairs and missions, sourcing, market identification), program delivery, service to other departments and agencies, negotiation of Canadian sourcing plans with sponsors of major projects, implementation of industrial benefit and offset agreements, and Ministerial briefings and correspondence.

The Office of Industrial Innovation has been established as the focal point for strategic planning of policies and programs in support of innovation. In carrying out its responsibilities, the office places a heavy emphasis on liaison and consultation with the private sector and with other government departments. Current initiatives of the office include developing an overview of the departmental approach to technological developments, a review of the efficiency of the

technology transfer process from government to industry, a strategy directed toward CAD/CAM and an approach towards further development of Technology Centres.

The office of Industrial Innovation also is establishing a capability for assessing new technologies and technological developments which are of strategic commercial interest to Canada. These activities will focus on those aspects of technological development that affect the ability of Canadian firms to innovate by exploiting and developing new technologies.

The Office of Industrial and Regional Benefits (OIRB) helps Canadian businesses take advantage of the opportunities promised by major project activity in Canada. The office is the focal point for consultation with the private sector on industrial and regional benefits issues related to major capital projects. It works closely with provincial governments on industrial benefits and, through the Canada Oil and Gas Lands Administration, advises the federal government with respect to the industrial benefits provisions of the Canada Oil and Gas Act.

The office consults with owners and sponsors of major capital projects to ensure that Canadian suppliers have full and fair access to major project opportunities. It encourages project sponsors to develop procurement policies in line with the government's industrial and regional benefits objectives and to put in place suitable organizational structures for carrying out these policies. It helps to identify areas where Canadian capability is most competitive, as well as areas of potential Canadian capability that merit development by sponsors.

In 1983-84, the office's responsibilities were expanded to encompass industrial and regional benefits from major government procurement. The new public sector procurement directorate of the OIRB manages industrial benefits programs associated with major government procurement (primarily defence procurement) by identifying industrial and regional benefits objectives, evaluating and ranking contractor bids, negotiating Canadian content and offset packages and administering the industrial benefits program after contracts have been awarded to ensure that commitments have been met.

The second major area of change related to the work of the OIRB is the recent measures which the government took to enhance Canadian control of its offshore and to promote industrial and employment opportunities from offshore development. These measures included the extension of the Canadian

customs and excise law over the continental shelf, the adoption of shipbuilding measures, including new tariffs on drill rigs and supply boats, and the proposed extension of trade legislation to the offshore.

In the export promotion area, Capital and Industrial Goods assisted Canadian participation and provided on-site manning at a number of key international fairs, missions and seminars. CIG also coordinated and promoted manufacturers' participation in major capital projects abroad and responded to sourcing enquiries.

In the urban transit sector CIG took the lead in testing interdepartmentally the concept of early identification and follow-up of major export projects through the establishment of project teams. In addition, CIG continued to be an active participant in the Program for Export Market Development (PEMD) to assist firms in identifying and penetrating foreign markets for their products. Besides its regular program delivery responsibilities, CIG was responsible for the establishment of a special PEMD fund allocated to urban transit feasibility studies.

As part of its business development mandate, CIG initiated consultations with a number of major firms aimed at mobilizing government support for the strategic development of those firms in Canada. One such consultation culminated during the year with the signing of a Corporate Development Agreement with Pratt & Whitney Canada to fund 12 new research, development and productivity improvement programs. This agreement will create some 6 000 new high technology jobs, and will generate \$20 billion in incremental sales.

CIG also participated in the Bell Helicopter project to establish a light twin helicopter manufacturing facility at Mirabel, Quebec. Pratt & Whitney Canada Inc. will invest \$252 million to develop a new helicopter engine family to be installed in the helicopters made in Canada by Bell. The Bell project and the Pratt & Whitney involvement will mean the creation of a total of 3 775 jobs (annual average level) in this high technology sector and will generate sales valued at \$9.9 billion over the next 20 years.

A Memorandum of Understanding was signed with Messerschmitt-Bölkow Blohm GmbH (MBB) of West Germany to invest \$72.6 million towards the development and manufacture in Canada of light twin-engine helicopters. MBB will develop this engineering capability at Fort Erie, Ontario, through a joint venture arrangement with Fleet

Industries. Over 20 years, the project is expected to generate sales of approximately \$1.3 billion and to create approximately 760 permanent jobs.

In addition, CIG led discussions with Transport Canada, VIA, Bombardier, Urban Transportation Development Corporation, Ontario Northland Railways and Ontario in the formation of two new rail passenger equipment development programs.

On the program side, CIG is responsible for the Defence Industry Productivity Program (DIPP), the Shipbuilding Industry Assistance Program (SIAP) and the Machinery Program.

Under DIPP, funding support for research and development, source establishment and plant modernization to the defence industry sectors continued to be a major activity involving approximately \$144 million in assistance for projects. Expenditures under the SIAP totalled \$77.4 million for the year and, since the shipbuilding subsidy element is not being maintained, new regulations and guidelines have been drafted to reflect these changes.

The Machinery Program provides an industrial development incentive with the two-fold objective of encouraging machinery manufacturers to derive maximum benefit from tariff provisions, and assisting machinery users to acquire advanced production equipment at the lowest possible cost through remission of duty on equipment not available from production in Canada.

During 1983-84, 14 200 requests for duty remission were assessed under the program. Duty remission was provided to approximately 250 firms in 1983-84 and amounted to an estimated \$370 million in net savings for machinery users in all industries. These remissions contributed to additional Canadian production of about \$1.2 billion and an estimated 15 000 in direct employment. In 1983-84, the Machinery Program provisions assisted 22 companies to increase the range of machinery products manufactured in Canada. Production started on 21 new product lines previously supplied entirely by imports, resulting in \$27 million of additional manufacturing in the first year and over 200 new jobs.

The Automotive Task Force presented its report to the Minister on May 19, 1983. The Minister issued a first response on August 15, 1983, responding positively to a number of Task Force recommendations in the areas of human resource development and government program and planning support for technological and industrial development in the automotive sector.

The Task Force proposal that the federal sales tax be levied on the wholesale price of cars to eliminate the tax advantage previously enjoyed by imports was adopted in the February 15 budget.

Further action in response to the Task Force included the addition of \$15 million to the 1983-84 ILAP budget, bringing total ILAP automotive parts specific funding to \$40 million. DRIE, in consultation with the industry and interested provinces, is undertaking an exhaustive study on the automotive parts industry and developing a comprehensive strategy for the sector. On the human resources side, training and retraining measures are being implemented by CEIC for auto workers under Manpower Consultative Service Agreements in consultation with the industry and the UAW. CEIC is also working with the industry on a human resources study which will examine emerging trends in labour demand and supply.

CONSUMER GOODS, SERVICES AND RESOURCE PROCESSING

The Consumer Goods, Services and Resource Processing group is made up of six operating branches:

- Resource Processing Industries Branch;
- Food and Consumer Products Branch;
- Service Industries Branch;
- Office of Industrial Adjustment;
- Market Development Branch; and
- Policy, Planning and Analysis Branch.

CGSRP during 1983-84 continued a heavy workload of service to industry and other departments and support of the DRIE regional offices in funded program delivery. It also carried out a number of major activities, including the design and launching of a new five-year Government of Canada Awards Program for Excellence in Productivity, Innovation and Design.

In the adjustment field, work began on definition of the department's future role. More immediately, there was active involvement in interdepartmental work related to the restructuring of the Atlantic fisheries and to the design of a successor program to ILAP. Assessments of the technical and market aspects of applications from textile, clothing and footwear firms were provided to the Canadian Industrial Renewal Board and briefings on both casework and policy issues were prepared for the departmental representatives on the Board.

In the area of innovation, a report on the national and international situation in biotechnology is near completion, and will identify potential major projects in this area. Special industry seminars were also organized on innovation and product development in the dairy and fishery sectors.

CGSRP was involved during the year in the work of several ministerial task forces and advisory committees including the Petrochemical Industry Task Force, which submitted its report to government in February, 1983. The Forest Industries Advisory Committee (FIAC) submitted an interim report on the current problems of the industry in August, 1983, and the government issued its response in February, 1984. An internal departmental Forest Products Task Force was also formed to review the major segments of the industry in depth and was to complete its findings early in the 1984-85 fiscal year. During 1983-84, government responses were also prepared to the reports of two service industry sub-sector task forces (distributive trades and consulting engineering) and background material was developed for the establishment of a permanent advisory committee on distributive trades. The Textile and Clothing Industrial Task Force was formally established in February, 1984.

Work was initiated to improve the quality of dialogue with major corporations in the CGSRP sectors and to increase understanding of their strategic plans as a prelude to possible development of department/company Memoranda of Understanding. Senior-level discussions were initiated with a number of companies in this regard.

In the policy area, preliminary work began on the formulation of a strategic policy framework for the service industries and on the identification of service industry sub-sectors for possible designation under IRDP. Work on sector profiles was also carried out in a number of sectors, including the household furniture, brewery, hockey equipment, precious metal refining, meat processing, leisure products, business forms, swimming pool and cookware industries. A study of the steel sector was also begun, as was an interdepartmental study on non-ferrous metal smelters which was to examine the modernization needs of the industry. In another interdepartmental arena, CGSRP played an active role in the work of a committee which reviewed the compulsory licensing provision of the Canadian Patent Act and consulted with the provinces and private industry on the implications of various policy options. It also assumed responsibility

for departmental participation in the Uranium Exports Review Panel and provided input to a review of uranium export policy.

In the area of domestic marketing, a new "Shop Canadian" marketing policy was developed incorporating, as an essential element, the participation of the private sector. The scope of this policy has also been broadened from past efforts to include not only the consumer market, but the industrial and institutional markets as well.

On the international front, support was extended to the Canadian wood products industry and External Affairs in relation to a U.S. countervail investigation. Advice and support were supplied on a number of other trade-related issues, including U.S. limitations on steel imports, proposals for sectoral Canada/U.S. bilateral trade liberalization, newsprint quotas in the EEC, and import policies and border measures in the textiles, clothing and footwear sector. CGSRP continued to be responsible for the administration of the Cooperative Overseas Market Development Program in British Columbia and negotiations were initiated with provinces and industry associations with a view to possible extension of the program east of the Rockies.

In the field of industrial co-operation, CGSRP contributed to meetings of both the Canada/EC subcommittee on industrial co-operation and the Canada-Japan Joint Economic Committee, both of which were hosted by Canada. Follow up work to these meetings was also carried out, as was activity designed to identify potential industrial cooperation opportunities with France, China, Australia and New Zealand.

During the year, the group provided responses to over 1 100 enquiries from FIRA, and processed nearly 400 PEMD cases and 300 tariff cases. CGSRP industry specialists planned and participated in more than 50 trade fairs, missions and seminars in Canada and abroad in order to help Canadian firms increase their penetration of foreign markets.

POLICY

The 1983-84 fiscal year witnessed a consolidation of the Policy Branch's responsibilities. The Policy Branch manages the policy development and coordination functions within the Department. Through the Policy Committee, it acts as the

department's focal point on trade related matters, provides the department with strategic policy research and economic analysis and intelligence, manages the strategic planning process and promotes a cooperative environment with the private sector through the Office of the Policy Advisor (Business and Labour). The branch has been designated to provide secretarial functions to the Policy Committee, which was established in early 1984. The Office of the Policy Advisor, Relations with Business and Labour, was created to act as the main departmental link with broadly-based private sector organizations and ensure appropriate consideration of their views; the Small Business Secretariat was amalgamated with the former Regional and Industrial Projects and Crown Investments Branch to become the Small Business and Special Projects Branch.

POLICY DEVELOPMENT AND INTERDEPARTMENTAL CONSULTATIONS

In addition to supporting the Policy Committee, several major policy development projects were initiated, notably on investment, industrial assistance, regional development, federal-provincial industrial development relations and Canada-U.S. economic relations. Many of these initiatives involve interdepartmental discussions as other departments have the lead responsibility.

An agreement was reached with the Department of External Affairs on a system of product sourcing, to assist in the capture of foreign trade opportunities. A Memorandum of Understanding was also developed on the secondment of personnel between DRIE and the Department of External Affairs in response to the need for close collaboration and sharing of trade-related expertise. In other respects, the Policy Branch was instrumental in the establishment of the Canadian Labour Market and Productivity Centre (CLMPC). The centre, whose board is drawn from both business and labour, will examine the critical issues of productivity improvement, labour market requirements, and employment growth in Canada.

STRATEGIC PLANNING

The Policy Branch was involved in several important initiatives during the year, including the preparation of the DRIE Corporate Directions Paper which set out the broad planning assumptions and priorities of the department for 1984-85 to 1988-89. As part of its responsibilities in strategic planning, the branch coordinated the development of the Sector Priority Statements and

the Regional Industrial Development Frameworks (RIDFs). The RIDFs, which are drafted by regional offices, provide an overview of the regional economic context of each province and territory, its industrial development opportunities and constraints and strategic direction for the medium term. The branch also prepared the annual DRIE Strategic Overview which was forwarded by the Minister to the Chairman of CCERD.

ECONOMIC ANALYSIS AND INTELLIGENCE

The Policy Branch carries out, twice a year, the Capital Investment Intentions Survey and produces regular reports analyzing its results. The survey covers close to 300 large corporations from all regions of Canada and looks at changes occurring in planned capital outlays as well as their explicative factors. As part of the annual strategic planning cycle, the Policy Branch prepares, on the basis of the Canadian Econometric Model for Structural Analysis (CEMSA), a medium-term economic outlook with special emphasis on the sectoral and regional dimensions. The branch also provides economic intelligence and various economic analyses, simulations, and statistical services in support of ongoing departmental activities and functions in headquarters and in the regions. The Policy Branch is also the custodian of the Development Index which is used as the basis for determining levels of assistance under the IRDP program. A method for designation of Special Tier 1 areas was developed to take into account any sudden and marked deterioration in economic conditions for those areas.

SMALL BUSINESS AND SPECIAL PROJECTS

The Small Business and Special Projects Branch was established in the fiscal year as a result of the merger of two former departmental units, namely the Small Business Secretariat and the Crown Investments Branch. The new branch has six directorates:

- Small Business Secretariat
- Special Projects
- Development Projects
- Investment Projects
- Adjustment Projects
- Crown Investments

THE SMALL BUSINESS SECRETARIAT

The responsibilities of the Small Business Secretariat include the coordination and formulation of policies to improve the entrepreneurial and operational climate for small business, establishing more effective lines of communication with the small business community and strengthening the Department's advocacy role for small business.

In 1983-84 the secretariat studied issues relating to small business and provided information and advice to other government departments doing work relating to small business. Through the use of consultants, research studies were carried out with respect to small business transaction costs, indirect contributions to exports, and relative performances of size groups in Canadian manufacturing sectors. These studies were reviewed, and made available to the small business community.

The Minister's Small Business Consultative Committee (SBCC) which is made up of 24 representatives from the business, academic, association and finance communities met six times and studied issues of current interest affecting small business.

The secretariat produced a Small Business Statistical Review, and a quarterly newsletter entitled "Small Business World".

Quite apart from responding to over 3 200 "Hot Line" requests related to small business in 1983-84, the secretariat managed the Management Excellence in Small Business (MESB) program which funded 63 work scholarships, 10 course developments, and nine research projects.

SPECIAL PROJECTS; DEVELOPMENT PROJECTS; INVESTMENT PROJECTS; ADJUSTMENT PROJECTS

The projects directorates are responsible for undertaking the analysis and negotiations of the most difficult, sensitive and complex industrial proposals for departmental investment assistance as well as loans and loan guarantees.

Projects are assigned to the branch by senior departmental management on an exception basis because experience has shown that major and sensitive cases can benefit from a specialized concentration of analytical expertise not generally available in line organizations. Accordingly, the branch has been staffed with many strategic, financial, economic and commercial analysis specialists.

In 1983-84 the projects directorates were involved in approximately 18 major cases and projects involving potential government funding in the order of \$3 billion with employment impacts potentially in all regions of Canada.

Among the most notable projects were Pratt & Whitney Canada Inc.; Bell Helicopters Ltd.; the Donkin-Morlen Coal Mines; and various others involving firms such as de Havilland, Canadair, Maislin, and White Farm. Some of the projects remain active in the new year.

CROWN INVESTMENTS

The Crown Investments Directorate was established to support the Minister in regard to responsibilities for Crown corporations. It also coordinates departmental relations with them and monitors their operations, strategies and business plans.

In 1983-84 the directorate managed departmental responsibilities for FBDB, CBDC, CPDL, CDIC, and EDC. CDIC and EDC, while reporting to other Ministers, were considered important elements of industrial policy and regional industrial development, and the directorate coordinated departmental advice, on their operations to Deputy Ministers and Ministers.

For FBDB, CBDC, and CPDL, which report to the Minister, the focus was to establish new relationships to enhance ministerial control, accountability and direction. In addition to advising on ongoing operational and financial matters, the directorate embarked upon several new initiatives which will carry on well into the next fiscal year. These initiatives ranged from new programs and mandates for FBDB and CPDL to a comprehensive review of the activities of CBDC and a review of major capital expansion opportunities.

PROGRAM DEVELOPMENT AND OPERATIONS

Program Development and Operations is responsible for providing administration, systems and policy support for the department's major funded industrial programs. The branch also administers the Small Businesses Loans Act under which guaranteed loans are provided by designated private lenders to assist small business enterprises.

The following is a summary of the activities during fiscal year 1983-84 for the principal programs administered by the department.

Industrial and Regional Development Program

The objective of the Industrial and Regional Development Program (IRDP) is to promote regional industrial development through the support of private sector initiatives with particular focus on projects, industries and technologies with the greatest potential for economic return, sustained growth and international competitiveness.

The IRDP is a new program which was created concurrently with the amalgamation of the Departments of Industry, Trade and Commerce (ITC) and Regional Economic Expansion (REE) to form the new DRIE. A number of the programs of the former departments were subsumed by the IRDP. The inception of the new program took place in July, 1983. For the period from inception to March 31, 1984, there was a total of 381 accepted offers of assistance for an estimated amount of assistance of \$82.6 million. For these accepted offers, the estimated number of jobs to be created or maintained is 8 688.

In terms of program elements, modernization/expansion projects represented approximately 35 per cent of the total estimated assistance under the IRDP during the period under review, followed by industrial development climate projects (22 per cent), innovation projects at 19 per cent and projects to establish new facilities at 15 per cent. The following table shows the regional distribution of the IRDP assistance for 1983-84.

Table 1

IRDP Accepted Offers -
Number and Estimated Amounts of Assistance
from Inception to March 31, 1984
by Province/Territory

	Number of Accepted Offers	Estimated Amount of Assistance (\$ million)
Newfoundland	19	1.6
Prince Edward Island	19	0.8
Nova Scotia	20	2.5
New Brunswick	54	5.8
Québec	103	16.5
Ontario	86	29.2
Manitoba	23	10.0
Saskatchewan	8	0.4
Alberta	21	2.8
British Columbia	25	12.9
Yukon/N.W.T.	3	0.1
Total	381	82.6

A classification of the IRDP data by major industry group is shown in Table 2. The statistics show that in terms of number of accepted offers the predominating industry sectors were food (61 accepted offers), wood, machinery and electrical and electronic products. In terms of estimated amount of assistance, the largest amount went to the machinery sector (\$15.5 million), followed by the industrial and heavy construction sector.

Table 2

IRDP Offers Accepted -
Number and Estimated Amounts of Assistance
from Inception to March 31, 1984
by Major Industry Group

Major Industry Group	Number of Accepted Offers	Estimated Amount of Assistance (\$ thousand)
Food	61	5 227
Beverages	4	244
Rubber Products	3	173
Plastic Products	17	2 456
Leather Products	1	77
Primary Textiles	1	100
Textile Products	1	358
Wood	42	6 608
Furniture & Fixtures	19	1 857
Paper Products	9	8 772
Printing & Publishing	2	52
Primary Metals	9	4 267
Metal Fabricating Products	30	5 949
Machinery	39	15 476
Transportation Equipment	15	1 111
Electrical/Electronic Products	37	4 387
Non-Metallic Mineral Products	12	797
Petroleum & Coal Products	1	17
Chemicals	23	2 983
Other Manufacturing	16	1 582
Industrial & Heavy Construction	3	11 000
Tourism	12	326
Other	24	8 818
Total	381	82 587

The creation of the new IRDP involved the incorporation of features of several of the ITC and DREE financial assistance programs which were previously managed separately. The major programs which were subsumed by the new program were the following:

- ° Enterprise Development Program (EDP)
- ° Support for Technology Enhanced Productivity (STEP)

- Co-operative Overseas Market Development Program (COMDP)
- Institutional Assistance Program (IAP)
- Regional Development Incentives Program (RDIP)
- Montréal Special Area Program (MSAP)

The following is a review of the activity of the EDP, RDIA, COMDP and IAP programs in 1983-84 prior to being subsumed by the IRDP.

Enterprise Development Program

The objective of the EDP was to assist manufacturing and processing firms to improve their viability and international competitiveness. It provided support by sharing project costs or providing insurance on term loans on a last-resort basis. In 1983-84 for the April-September period (following which the program was subsumed by the IRDP), there were 382 innovation assistance projects which were authorized under the EDP for an authorized amount of \$70.1 million (Table 3). Two-fifths of these projects were from the electrical and electronics industry sector and one-fifth from the machinery sector (Table 4). Forecasts for the EDP Innovation projects indicate sales of \$9.5 billion during the next five years and the creation or maintenance of 6 175 jobs.

The above total of 382 EDP innovation projects includes 107 STEP projects (Support for Technology Enhanced Productivity) with an authorized value of \$5.6 million. The STEP program was designed to enhance productivity in Canadian industry by encouraging the use of new electronic dependent production, process and design technologies and use of microelectronics to improve quality and to create new products.

Table 3

Innovation Authorizations under the Enterprise Development Program by Province/Territory 1983-84

	Number of Projects	Amount (\$ millions)
Newfoundland	3	0.2
Prince Edward Island	10	0.8
Nova Scotia	8	1.8
New Brunswick	7	0.1
Québec	164	17.9
Ontario	106	33.4
Manitoba	33	2.0
Saskatchewan	13	1.6
Alberta	22	3.9
British Columbia	16	8.4
Yukon/N.W.T.	-	-
Total	382	70.1

Table 4

**Innovation Authorizations under the
Enterprise Development Program
by Industry Sector 1983-84**

Industry Group	Number of Projects	Amount (\$ thousands)
Mines	1	61
Food	18	1 495
Rubber Products	12	711
Footwear	1	5
Wood	8	139
Furniture & Fixtures	10	618
Paper	2	27
Primary Metals		
(Ferrous)	3	43
Primary Metals		
(Non-Ferrous)	2	25
Metal Fabricating	15	1 370
Machinery	74	19 188
Aircraft & Parts	1	150
Other Transportation		
Equipment	25	10 141
Electrical & Electronic		
Products	158	29 692
Mineral Products	3	569
Petroleum Products	1	14
Drugs & Medicine	4	277
Other Chemical Products	9	1 079
Scientific Instruments	14	3 388
Other Manufacturing	20	1 107
Non-Manufacturing	1	15
Total	382	70 114

Also for the April-September period, 24 EDP adjustment assistance loan insurance projects were approved for an authorized amount of \$15.9 million of assistance. It is estimated that this assistance will lead to the creation or maintenance of approximately 1 114 jobs during the next five years.

One-half of the total assistance of \$15.9 million was for two projects from the wood industry sector and one project from primary metals (non-ferrous).

Table 5

**Adjustment Assistance
Loan Insurance Authorizations
by Province/Territory 1983-84**

	Number of Projects	Amount (\$ millions)
Newfoundland	-	-
Prince Edward Island	-	-
Nova Scotia	2	0.9
New Brunswick	2	0.9
Québec	4	6.0
Ontario	10	5.5
Manitoba	4	1.7
Saskatchewan	-	-
Alberta	-	-
British Columbia	2	0.9
Yukon/N.W.T.	-	-
Total	24	15.9

Regional Development Incentives Program

The purpose of the Regional Development Incentives Program (RDIP) was to create jobs and to encourage capital investment in slow-growth areas of Canada. It provided financial assistance in the form of incentive grants and loan guarantees to business and industry to establish, expand or modernize facilities in various designated regions of the country.

As previously indicated, RDIP was one of the programs subsumed by the IRDP. The RDI Act, however, does not expire until December 31, 1984. Thus it was possible after the inception of the IRDP in July 1983, for project applications to continue being received under the RDIA provided the projects would reach the commercial production stage by December 31, 1984.

As shown in Table 6, there were 420 net accepted offers of incentives during 1983-84 for a Crown commitment of \$70.9 million. The projects assisted are expected to create approximately 6 396 direct jobs and involve \$29.1 million in capital investment by private industry.

Table 6

Net Accepted Offers under the
Regional Development Incentives Program
by Province/Territory 1983-84

	Net Accepted Offers	Estimated Amount of Incentive (\$ millions)
Newfoundland	6	0.5
Prince Edward Island	18	2.1
Nova Scotia	26	4.0
New Brunswick	13	2.7
Québec	254	40.4
Ontario	22	10.3
Manitoba	54	4.7
Saskatchewan	19	4.4
Alberta	2	0.1
British Columbia	5	1.6
Yukon/N.W.T.	1	1.1
Total	420	70.9

Table 7 comprises a classification of the RDIP statistics by industry sector. The figures show that the predominating sectors are wood, food, metal fabricating, transportation equipment, electrical and electronics products and chemicals.

Table 7

Net Accepted Offers under the
Regional Development Incentives Program
by Industry Group 1983-84

Industry Group	Net Accepted Offers	Estimated Amount of Incentive (\$ thousand)
Food Industries	64	1 160
Rubber Products	6	217
Plastic Products	20	3 794
Leather & Allied Products	2	118
Primary Textiles	-	-
Textile Products	2	379
Clothing	-	-
Wood Industries	71	15 258
Furniture & Fixtures	12	542
Paper & Allied Products	6	720
Printing & Publishing	16	1 046
Primary Metals	12	2 303
Metal Fabricating	53	6 958
Machinery	30	3 623
Transportation Equipment	23	8 224
Electrical & Electronic Products	23	5 382
Non-Metallic Minerals	13	1 849
Petroleum Products	3	321
Chemicals	21	10 128
Other Manufacturing	23	3 704
Non-Manufacturing	20	1 193
Total	420	70 919

One component of the RDIP was the Montréal Special Area Program (MSAP) to encourage the establishment, expansion or modernization of certain manufacturing and processing industries and the transfer of technology, and industrial research and development within Montréal and the surrounding area. This particular program terminated with the inception of the IRDP. Of the Québec totals shown in Table 6, there were 80 MSAP net accepted offers for an estimated incentive of \$20.0 million.

One RDIP loan guarantee project was authorized in 1983-84 for a guaranteed amount of \$500 000.

Institutional Assistance Program

The primary objective of the Institutional Assistance Program (IAP) was to provide financial support to non-profit institutions to develop and offer specialized services to industry and to individuals for studies which indirectly foster industrial development in Canada.

The program also provides grants for scholarships and studies in managerial or technological capabilities or for information that could assist the development of industrial policies.

For 1983-84, there were 118 projects approved under the IAP for grant assistance in the amount of \$793 594. The bulk of this assistance (\$637 614) was provided to non-profit institutions; or more specifically, university research facilities. The remainder of the assistance consisted principally of assistance to individuals in the form of scholarships.

Cooperative Overseas Market Development Program

The Cooperative Overseas Market Development Program (COMDP) was one of the programs subsumed by the IRDP. The objectives of the COMDP were, firstly, to stimulate integrated growth and development of the wood products industry of B.C., with particular emphasis on the northern and interior regions of the province and on more fully manufactured products from this industry sector, and secondly, to achieve greater recognition and acceptance of Canadian wood product specifications, building practices and supply capabilities in foreign building codes and standards and with local trade.

The amount of assistance paid out under the COMDP during 1983-84 totalled \$1.9 million.

In addition to the IRDP and those programs which have been subsumed by the IRDP, there are a number of other departmental assistance programs which continue to be managed separately. The following material comprises a review of the activity of these additional programs.

Small Businesses Loans Program

The Small Businesses Loans Program, established under the Small Businesses Loans Act, makes term loans available to small Canadian businesses to finance a wide variety of capital expenditures. The loans, guaranteed by the federal government, bear maximum interest rates of the charter banks' prime rate plus one per cent. The maximum term is ten years.

A total of 28 511 loans for \$776.0 million were made under the program in 1983-84 (Table 8). Loss claims paid during the same period totalled \$25.4 million.

Table 8

**Loans under the Small Businesses Loans Act
by Province/Territory 1983-84**

	Number of Loans	Amount (\$ millions)
Newfoundland	402	10.8
Prince Edward Island	113	2.7
Nova Scotia	556	14.3
New Brunswick	773	24.1
Québec	11 067	298.9
Ontario	5 984	171.2
Manitoba	817	22.1
Saskatchewan	1 507	41.7
Alberta	2 166	57.5
British Columbia	5 010	129.8
Yukon	78	1.8
Northwest Territories	38	1.1
Total	28 511	776.0

The 28 511 SBLA loans made in 1983-84 are classified by type of business in Table 9. The data show that the largest volume of business was done with service businesses followed by retail, manufacturing and transportation firms.

Table 9

**Loans under the Small Businesses Loans Act
by Type of Business 1983-84**

Type of Business	Number of Loans	Amount (\$ millions)
Wholesale Trade	1 140	25.6
Retail Trade	6 928	201.8
Construction	2 794	70.6
Manufacturing	2 908	82.3
Service Businesses	11 376	309.6
Transportation	3 051	79.1
Communications	314	7.0
Total	28 511	776.0

Small Business Investment Grant (SBIG)

This program was announced in the June 28, 1982, budget to provide temporary interest assistance for small businesses including farmers and fishermen, whether incorporated or not, as an inducement to undertake investment to:

- (1) finance purchases after June 28, 1982, and before March 31, 1983, of depreciable new property to be used in an active business in Canada; and
- (2) finance expenditures on scientific research after June 28, 1982, and before March 31, 1983.

The form of assistance is a monthly grant of up to four per cent per year on the outstanding loan for two years from the date of issue of the loan which an eligible small business borrower negotiated with a financial institution subject to normal commercial lending practices.

The total amount of eligible loans to an eligible small business borrower or related group of businesses was limited to \$500 000 and to qualify, a loan had to be for at least \$10 000.

Grants were being paid to 5 742 SBIG applicants from every province and territory in Canada who borrowed a total of \$358 145 060 and used the proceeds for new investment during the eligible period, that is, after June 28, 1982, and before April 1, 1983.

Due to rapidly declining interest rates after June 28, 1982, the average SBIG grant was well below the four per cent per year maximum.

In 1983-84, the amount of SBIG grants paid totalled approximately \$4.2 million. As shown in Table 10, the largest number of grants and amount paid were located, firstly in Ontario and secondly in Québec.

Table 10

Grants Paid under the Small Business Investment Grant Program by Province/Territory 1983-84

	Number of Grants	Amount (\$ thousand)
Newfoundland	101	115
Prince Edward Island	56	48
Nova Scotia	133	124
New Brunswick	127	105
Québec	1 253	1 049
Ontario	1 686	2 203
Manitoba	372	194
Saskatchewan	1 081	325
Alberta	525	502
British Columbia	394	464
Yukon/N.W.T.	14	25
Total	5 742	4 154

Defence Industry Productivity Program

The Defence Industry Productivity Program (DIPP) provides financial assistance to industrial firms involved in the production of defence or defence-related products for export, in order to develop and sustain the technological capability of the Canadian defence and related civilian industries. The program operates under international agreements for defence development and production sharing.

A total of 155 projects were authorized during fiscal year 1983-84 for an authorized amount of \$74.9 million (Table 11). By program component, the totals comprised 16 R&D projects for a value of \$25.1 million, 79 source establishment projects valued at \$31.8 million, 57 capital assistance projects for \$17.6 million and three market feasibility studies for \$0.4 million. The bulk of the projects involved manufacturing firms located in Ontario and Québec.

Table 11

**Projects Authorizations under the
Defence Industry Productivity Program
by Province/Territory 1983-84**

	Number of Projects	Amount (\$ millions)
Newfoundland	-	-
Prince Edward Island	-	-
Nova Scotia	3	0.4
New Brunswick	-	-
Québec	48	25.4
Ontario	95	32.7
Manitoba	4	1.4
Saskatchewan	-	-
Alberta	-	-
British Columbia	5	15.0
Yukon/N.W.T.	-	-
Total	155	74.9

On an Industry sector basis, 78 of the authorized projects were in the transportation equipment sector for an authorized amount of \$33.8 million. Approximately the same amount of assistance was authorized for 46 projects in the electrical and electronic products sector.

Table 12

**Project Authorizations under the
Defence Industry Productivity Program
by Type of Business 1983-84**

Major Industry Group	Number of Projects	Amount (\$ thousand)
Plastic Products	1	582
Primary Metals	15	1 882
Metal Fabricating	1	83
Machinery	2	813
Transportation Equipment	78	33 784
Electrical & Electronic Products	46	33 926
Non-Metallic Minerals	3	1 353
Chemicals	5	730
Other Manufacturing	4	1 769
Total	155	74 922

Shipbuilding Industry Assistance Program

The Shipbuilding Industry Assistance Program (SIAP) provides assistance to established shipbuilders engaged in the building and conversion of ships of specified minimum sizes. Assistance is also provided for projects designed to achieve productivity improvements in the shipyards.

During the past year, assistance was provided for 48 projects with an authorized value of \$42.4 million. Twenty-two of the projects with a value of \$37.3 million provided for the building and/or conversion of ships while there were 26 productivity improvement projects valued at \$5.1 million.

Industry and Labour Adjustment Program

Under a major program initiated by the federal government in January 1981, 12 communities in several regions of the country were designated during the past two fiscal years as eligible for federal aid to alleviate unemployment. This program was designed to reduce the distress in communities caused by permanent, large-scale industrial dislocations and associated layoffs of area workers. The program expired in March of 1984.

During 1983-84, a total of 106 ILAP projects were approved for an authorized amount of Crown assistance of \$48.8 million (Table 13). Approximately 80 per cent of these projects were located in Ontario and the bulk of the remainder was in Québec.

Table 13

**Projects Authorizations under the
Industry and Labour Adjustment Program
by Province/Territory 1983-84**

	Number of Projects	Amount (\$ millions)
Newfoundland	-	-
Prince Edward Island	-	-
Nova Scotia	3	1.0
New Brunswick	-	-
Québec	17	1.6
Ontario	84	46.0
Manitoba	-	-
Saskatchewan	-	-
Alberta	-	-
British Columbia	2	0.2
Yukon/N.W.T.	-	-
Total	106	48.8

On an industry sector basis, the statistics in Table 14 show that one-half of the approved ILAP projects were accounted for by the industry sectors of transportation equipment, metal fabricating and machinery. Significant amounts of assistance also went to the sectors of non-metallic minerals, rubber products, plastic products, and the wholesale group of metals, hardware, plumbing, heating and building materials.

Table 14

**Projects Authorizations under the
Industry and Labour Adjustment Program
by Major Industry Group 1983-84**

Major Industry Group	Number of Projects	Amount (\$ thousand)
Mines	3	956
Food	8	1 533
Rubber Products	2	6 097
Plastic Products	6	2 367
Leather & Allied Products	2	1 284
Textile Products	2	260
Wood	3	55
Furniture & Fixtures	2	79
Paper & Allied Products	1	19
Printing, Publishing & Allied Products	1	108
Primary Metals	3	251
Metal Fabricating	21	7 063
Machinery	10	3 305
Transportation Equipment	23	11 154
Electrical & Electronic Products	2	200
Non-Metallic Minerals	3	10 300
Chemicals	3	241
Other Manufacturing	1	138
Industrial & Heavy (Engineering) Construction	2	121
Motor Vehicle, Parts & Accessories, Wholesale	2	247
Metals, Hardware, Plumbing, Heating & Building Materials, Wholesale	2	2 723
Machinery, Equipment & Supplies, Wholesale	2	52
Business Services	2	259
Total	106	48 812

THE COMPTROLLER

The Comptroller provides objective advice and management support in policy making and program direction. The Comptroller is responsible for the design and coordination of the department's management planning and control process, the provision of financial and information services and management support.

The functions and major activities of the branches reporting to the Comptroller are:

RESOURCE MANAGEMENT BRANCH

The branch provides ongoing advice on resource management and allocation to senior departmental management and other responsibility centres to ensure that resources are deployed in a manner consistent with government and departmental priorities. The Resource Management Branch is involved in most planning, programming and budgeting activities, and is a source of advice on the resource and policy implications of project and program proposals.

The branch consolidates the departmental Multi-Year Operational Plan, prepares Main and Supplementary Estimates, and allocates and controls budgets.

FINANCIAL OPERATIONS BRANCH

The branch is responsible for developing and implementing financial policy and systems, accounting for and controlling financial resources, auditing assistance projects and providing financial advisory services.

During the year, the very different financial organizations of the former DREE and ITC were restructured, the Resource Accounting Management System set in place, and the departmental project audit policy developed.

ADMINISTRATIVE SERVICES BRANCH

The branch is responsible for administrative policy, manuals and directives, contracting and material administration, property administration, telecommunications, printing and duplicating, word processing, forms management, records management, micrographics, mail and messenger services, travel services, office automation, library services and the management of administrative service units for all headquarters elements of the department.

Major activities during the past year have centered around completing the integration of the two former departments, developing and implementing new policies and procedures to meet the new organization's requirements and developing various initiatives to improve the efficiency and effectiveness of services provided. A significant amount of effort was also expended in developing service and support mechanisms for the regional elements of the department.

COMPUTER SERVICES BRANCH

The branch develops and maintains computer-based systems design software and operating software. It is responsible for the physical management of corporate data, and the provision and operation of all physical computer facilities, including hardware and data communication networks. The department spent \$9.1 million in 1983-84 to purchase data processing goods and services from the private sector.

The merger of DREE and ITC required that information systems be re-designed to service the needs of the new department. To address this need, the Computer Services Branch developed and implemented a range of major new management information systems for finance, program support and company data. Other activities included the establishment of a Micro-Computer Centre which is now actively assisting other branches to acquire and use micro-computers to aid them in improving the efficiency and effectiveness of their operations.

PROGRAM EVALUATION BRANCH

The branch provides information on the effectiveness of departmental programs and recommends appropriate changes. The major activities during the year involved evaluation studies on marketing, innovation and pulp and paper, and assessments in the areas of the Industry and Labour Adjustment Program, and the Product Development Management Program. Evaluation frameworks were also completed for Credit Reinsurance, Tourism Development and the Small Business Investment Grant program. In addition, a number of subsidiary agreements were evaluated in conjunction with regional program evaluation personnel.

MANAGEMENT PRACTICES BRANCH

The branch coordinates the department's Management Action Plan to improve management practices and controls, and conducts studies aimed at developing, enhancing and integrating management

processes. In this role, the branch responds to the requirements of the Office of the Comptroller General under its Improvement of Management Practices and Controls Program.

The Management Action Plan has provided a forum for the development and implementation of tasks aimed at establishing and maintaining sound management practices in the department. Particular emphasis has been placed on the departmental planning process, including preparation of an Operational Plan Framework. Progress has also been made in developing performance indicators as a first step towards developing a departmental productivity enhancement strategy.

INFORMATION RESOURCE MANAGEMENT BRANCH

The branch is responsible for the application of the resource management principles to all departmental information resources and performs a departmental policy and planning function in this area.

Branch activities focussed on the development of the departmental Long Range Systems Plan, the coordination of integration activities associated with departmental information systems and the establishment of a policy framework with particular emphasis on micro-computers and office automation.

ACCESS TO INFORMATION AND PRIVACY OFFICE

The office was created in response to the government enacting access to information and privacy laws. The primary responsibilities include assisting the public with access requests, developing policies, and advising senior management on the administration of the legislation and the disposition of cases.

During the past year, a substantial foundation was laid for the sound implementation of the Access to Information and Privacy Acts. In particular, through seminars and documentation, senior departmental managers have been made aware of the key features and implications of the legislation.

In the period from July 1, 1983, to March 31, 1984, a total of 43 formal requests were received under the Access to Information Act and three under the Privacy Act. In addition, while no statistics have been maintained, a number of requests were disposed of on an informal basis. This is in keeping with departmental policy which encourages the use of existing departmental communications channels for obtaining departmental information.

PORTFOLIO MANAGEMENT BRANCH

Portfolio Management coordinates the department's operational planning process. Through the operational plan, the branch is responsible for providing a common sense of direction throughout the department, harmonizing regional, sectoral and support activities, tracking operational performance and ensuring accountability.

The operational planning process was strengthened during 1983-84, and the branch was involved in a series of highly successful regional-sectoral planning sessions in order to better channel resources in achieving the new department's mandate.

T O U R I S M

Canada's travel industry consists of more than 100 000 businesses, many of them small and most Canadian-owned, that employ directly approximately 600 000 Canadians, a sizeable contribution to the country's labour force.

Overall, some 13 million long-term visitors came to Canada in 1983, up one per cent from 1982. U.S. residents entering Canada for overnight or longer stays numbered in excess of 11 million, up 2.4 per cent from 1982. Visitors from other countries totalled approximately 1.6 million in 1983, down 8.1 per cent from 1982.

While visits to Canada by travellers from Japan, Hong Kong and Israel increased in 1983, these gains were offset by decreases in the numbers of visitors from several of Canada's traditional overseas markets, including the United Kingdom, West Germany, France and The Netherlands.

Canadians returning from spending one night or more in other countries totalled 13.7 million, up 15.2 per cent from 1982.

Canada earned \$3.9 billion from international travel in 1983, up 3.5 per cent from the \$3.7 billion the country earned in 1982. Canadians travelling abroad spent \$5.9 billion in 1983, up 18.6 per cent from the \$5.0 billion they spent in 1982.

As a result, Canada's international travel deficit increased by 62.5 per cent, from \$1.3 billion in 1982 to \$2.1 billion in 1983.

Assistance to the Canadian tourism industry is provided at the headquarters federal level by the Tourism Branch of the department under three areas: Tourism Development, Tourism Marketing and Corporate Affairs.

TOURISM DEVELOPMENT

The advent of the new federal economic development process, and full implementation of operations as part of DRIE, have introduced some new operations to Tourism Development. The initial inclusion of tourism as an eligible sector under the Industrial and Regional Development Program (IRDP) brought Tourism Development into the DRIE program policy function. Considerable staff resources were devoted over the summer of 1983 to the development of policies and criteria for the delivery of the program to the tourism industry.

Following upon the introduction of IRDP, federal-provincial negotiations began on the new Economic and Regional Development Agreements (ERDAs). Under the authority of these ERDAs, Ministers directed the development of Subsidiary Agreements or Memoranda of Understanding on tourism between the federal government and all provinces and territories. Tourism Development was designated the responsibility centre for federal-regional consultation and coordination on these documents. To date, several have been signed with the balance in various stages of development.

Traditional operations of Tourism Development continued to bear fruit over the last fiscal year. The Tourism Investment Stimulation Program sponsored its first investment seminars in Hong Kong and Singapore. Coordinated with Department of External Affairs posts, these seminars attracted more than 150 participants. Presentations were made on the Canadian tourism industry, its opportunities for investment and the Canadian investment climate and structure.

More than \$15 million in financial assistance was provided during the fiscal year for the construction of trade and convention centres. Major recipients were Canada Harbour Place (Vancouver) and the Metropolitan Toronto Convention Centre.

In cooperation with the Canada Employment and Immigration Commission, Tourism Development committed nearly \$8 million to more than 40 tourism development projects demonstrating significant job creation.

A major educational/training project under development for nearly a year was completed in the fall of 1983. This project, entitled "Tourism is Your Business", involves a video instruction program and supplementary print instruction manual and study guide. The package is aimed at upgrading the business and management skills of operators of small and medium-sized lodging businesses located in smaller or remote communities where traditional resources are less accessible.

To date, the program has been distributed by TV Ontario, Knowledge Network in British Columbia and the Atlantic Satellite Network in Atlantic Canada.

Work continues on horizontal issues affecting the industry in such areas as National Parks policy, air deregulation, and passenger rail service.

TOURISM MARKETING

Tourism marketing operations included:

- "Vacation Canada" advertisements placed in periodicals reaching more than 70 per cent of all Canadian households.
- An estimated \$70 million of tourism business was transacted at the seventh annual Rendez-vous Canada in Toronto, May 1-5, 1983, an increase of \$9 million from 1982. The International marketplace attracted 372 Canadian selling organizations, 247 foreign buying organizations and 31 international media representatives.
- TourCan, an annual domestic marketplace, was held in Quebec City, September 11-15, 1983. The program was jointly sponsored by the Province of Quebec (Tourisme Québec) and Tourism Branch, DRIE. TourCan '83 provided the opportunity for sellers of tourism products from Quebec to meet with wholesalers and operators from across Canada.

CANMAP

The Canadian Marketing Assistance Program (CANMAP) introduced April 1, 1982, was designed to increase the demand for Canada's travel facilities and services by encouraging the domestic and international travel trade, through a cost-sharing program, in the development and marketing of Canada's package tours in the domestic and foreign markets. The program provided financial support to a maximum of \$25 000 or 50 per cent of the eligible costs, whichever was less.

Based on the sampling of 43 applications processed during FY 1982-83, Tourism Canada's contribution of \$478 495 for a total of \$1 066 856 resulted in incremental sale of Canadian tourism products and services amounting to \$23 260 485.

The computerized meetings and incentive travel data bank made detailed profiles of approximately 5 400 U.S. organizations able to meet in Canada directly available to the industry.

Approximately 400 association executives, meetings planners and incentive travel influencers visited major Canadian destinations through the site inspection program. A 23 per cent increase in meetings and convention revenue was recorded by the sales development firm working on contract to Tourism Canada in the United States, which can be attributed in part to the allocation of incremental funds to this activity.

Tourism Branch stimulated a Canada Customs program review, which resulted in the updating of policies and procedures relating to the entry into Canada of meetings, conventions/exhibitions and incentive groups. An Order-in-Council also resulted in significant changes and streamlining of regulations and guidelines relating to the entry into Canada of these groups.

Overseas Marketing Communications encompassed programs in primary markets -- United Kingdom, West Germany, France, Holland, Mexico, Australia and Japan -- as well as activities in prioritized emerging markets such as Hong Kong.

Program highlights included: France: an extensive pictorial/editorial campaign based on the 450th anniversary of Jacques Cartier's arrival in Canada; United Kingdom: partner co-operation campaign based on incremental funding; West Germany: a major fine-tuning of consumer strategy to reach a younger target audience with broader product appeal; Japan: emphasis on the young female market including consumer contests; Australia: use of noted Canadian personality Donald Sutherland and co-funding by both CP Air and Qantas Airlines.

In addition market development work continued in South America, southeast Asia and southern Europe; and the Minister of State for Small Business and Tourism visited two U.S. cities, beginning a six-city communications tour promoting the "Year of Tourism" and the increased advertising initiatives in the United States.

CORPORATE AFFAIRS

Corporate Affairs ensures ongoing research support in terms of supply, demand, cost/benefit and impact studies, including the maintenance of a comprehensive tourism data base; plans, develops and recommends policy; monitors program activity; operations; acts as a focal point for government and industry relations through a coordination secretariat; and is responsible for corporate information related to tourism within DRIE.

The Corporate Policy and Strategic Planning group, as its prime function in fiscal year 1983-84, addressed a wide range of policy issues, with the impact of taxation on tourism being a major concern. A review was also commenced on the application of technology to tourism.

Research and Analysis contracted with Statistics Canada for the fieldwork for the Canadian Tourism Attitude and Motivation Study. Market probes were conducted in the United Kingdom, France, The Netherlands and Singapore, and an attitude study was conducted in Hong Kong. A tracking study designed to evaluate the In-Canada promotional campaign was instituted. Work continued on the analysis of the 1982 Canadian Travel Survey data.

The Planning and Evaluation group prepared short-term plan for management of electronic data processing projects and a long-term operational plan for Tourism. Completion of phase I of an office automation pilot project and the piloting of an exit interview questionnaire were innovative achievements of potential benefit to DRIE.

The Coordination Secretariat, in addition to providing the necessary logistical support to the Conference of Canadian Tourism Officials and the Federal-Provincial Conference of Tourism Ministers, continued its effort to establish a dialogue with labour through the Canadian Labour Congress, and provided the secretariat for the newly-inaugurated Minister's Tourism Advisory Council. The 1983 Tourism Medallion Program, designed to provide recognition to those who have provided noteworthy services to tourism at the national and provincial levels, was the responsibility of this area.

The Information Services group, through the aegis of its tabloid Canada Tourism, kept clientele external to the department aware of the activities of Tourism within DRIE. A bulletin highlighting newsworthy press items, and a Media Review surveying major newspaper articles relevant to all sub-components of the tourism sector, kept a more restricted audience fully informed of major happenings in the industry.

Contributions through active participation and provision of working documents to the deliberations of the Tourism Committee of the Organization for Economic Co-operation and Development, provision of major inputs to the debate on tourism by the Opposition in the House of Commons, and the responding by most sections of Corporate Affairs to numerous ministerial enquiries, rounded out the activities of this directorate.

REGIONAL ACTIVITIES

In addition to the programs previously described, personnel of the new department continued to administer the subsidiary agreements of the Department of Regional Economic Expansion and the Regional Development Incentives Program.

These activities are described by province and territory.

NEWFOUNDLAND

Departmental expenditures in Newfoundland during the period under review continued to be concentrated under GDA subsidiary agreements. New agreements covering Industrial Development II and the Institute of Fisheries and Marine Technology were signed.

Under the Industrial Development II subsidiary agreement, the federal government is constructing a series of incubator malls and industrial parks at strategic locations in central and western Newfoundland. The Institute agreement commits both levels of government to the construction of a replacement facility for the present Fisheries College in St. John's to meet new training demands in marine technology and the offshore.

Amendments were made to the Rural Development and Tourism subsidiary agreements during the year and there was positive response to the department's Industrial and Regional Development Program. Forecast cash flows did not take place for a number of initiatives originally planned for implementation in 1983-84. Advances to Newfoundland and Labrador Development Corporation did not flow as the triggering investment by Newfoundland firms on new plant and equipment projects was substantially curtailed. Expenditures for a new Rural Development Agreement, Ocean Industries Development and a new Tourism Development Initiative did not flow as these new initiatives have yet to get approval.

Following is a description of activities in the Newfoundland Regional Office under subsidiary agreements and other programs during 1983-84.

SUBSIDIARY AGREEMENTS

Labrador

Duration: 03/12/76 to 31/03/84

Costs shared by:

DRIE	\$ 18 258 300
Health & Welfare Canada	1 404 000
Provincial government	2 434 700
Total estimated cost	\$ 22 097 000

DRIE expenditure to date	\$ 17 037 720
DRIE expenditure 1983-84	\$ 174 186

The components of this Interim agreement include: provisions for municipal infrastructure and economic development in the Lake Melville area; the construction of a bridge in North West River;

the construction of an industrial park for Wabush-Labrador City; and the provision for coastal residents of higher quality water, improved domestic sanitation, and improved access to medical services.

A 32-ha industrial park has been constructed at Wabush to serve western Labrador and northeastern Québec; a bridge has been built in North West River, linking the two sides of the community and linking the north side to Goose Bay and Churchill Falls; and street and neighbourhood improvement has been undertaken in Happy Valley-Goose Bay, along with the construction of a residence for the vocational school. A development corporation has been funded to spearhead economic development. Water, sewer, and waste disposal services have been provided in a number of coastal communities. Nursing clinics have been constructed to serve the basic health needs of residents in three isolated coastal communities. Caribou herd studies, biophysical studies, community plans, and transportation and port planning have all been undertaken.

Rural Development

Duration: 01/04/78 to 30/09/83

Costs shared by:

DRIE	\$ 15 122 000
Provincial government	680 000
Total estimated cost	\$ 16 802 000

DRIE expenditure to date	\$ 14 827 135
DRIE expenditure 1983-84	\$ 2 238 556

This agreement continues earlier initiatives to revitalize and strengthen the rural sector of the province. Projects include assistance to incorporated regional development associations for administrative and community project purposes. Support is also provided to craft associations, craftspersons and small rural enterprises.

Assistance to the regional development associations includes funding for basic administrative purposes; training; and planning and implementation of locally designed community development projects, which have ranged from elementary forms of fish processing to a woolen mill.

Financial aid is provided to small rural enterprises that do not qualify for assistance under the Regional Development Incentives Program, such as boat building, wood working, fish processing and small manufacturing activities. Craft assistance is provided in the form of design assistance and for expansion of production and marketing.

This agreement expired September 30, 1983. A new agreement is currently being negotiated with the province. In the interim, financial assistance is being provided directly to the development and craft associations by the department.

Pulp and Paper Mill Modernization

Duration: 01/06/81 to 31/03/85

Costs shared by:

DRIE	\$ 30 000 000
Provincial government	3 333 000
Total estimated cost	\$ 33 333 000

DRIE expenditure to date	NII
DRIE expenditure 1983-84	NII

Under this agreement, Canada and the province will participate jointly in a program of incentives for the pulp and paper industry in Newfoundland. The objectives of the agreement are to improve the viability, efficiency and international competitiveness of the Newfoundland pulp and paper industry by accelerating and maximizing investment and encouraging policies within the private sector which are supportive of good forest management, pollution abatement, and industrial modernization.

The funds will be used for possible assistance to the Bowater Newfoundland Limited mill in Corner Brook and to the Abitibi-Price Inc. mill in Grand Falls.

Community Development for Coastal Labrador

Duration: 29/05/81 to 31/03/87

Costs shared by:

DRIE	\$ 33 800 000
Provincial government	5 196 000
Total estimated cost	\$ 38 996 000

DRIE expenditure to date	\$ 21 565 143
DRIE expenditure 1983-84	\$ 8 083 320

The components of this agreement include: reconstruction and paving of the Straits Highway in southern Labrador and inter-community roads in southeastern Labrador; provision for coastal residents of improved water and domestic sanitation facilities; construction of additional medical clinics, and funding for investigative studies toward development of small industry in the region.

A 50 km section of the Straits Highway has been reconstructed and paved. The access road from William's Harbour to George's Cove has been completed and work is underway on the road from Mary's Harbour to Lodge Bay. The latter will be completed in the 1984 construction season.

Water and sewer projects are under way in L'Anse Au Clair, Forteau, L'Anse Au Loup and Cartwright. The systems for these communities are nearing completion. Contracts have been awarded for systems in Mary's Harbour and West St. Modeste. Design is continuing for Red Bay.

Construction of the new medical clinic at St. Lewis is complete as is the renovation of the existing facility at Mary's Harbour. Work is continuing on the new building for Black Tickle, while design for the renovations at Cartwright has been completed and work is expected to get underway shortly.

Studies and pilot projects are being carried out on tourism, agriculture, cadastral mapping, minerals, communications, training needs, trapper education and caribou management.

Industrial Development - Phase I

Duration: 11/06/79 to 31/03/84

Costs shared by:

DRIE	\$ 23 985 000
Provincial government	2 665 000
Total estimated cost	\$ 26 650 000

DRIE expenditure to date	\$ 22 628 541
DRIE expenditure 1983-84	\$ 3 654 798

This agreement supports industrial development in the province, initially in the Corner Brook and Stephenville areas of western Newfoundland, through the provision of the infrastructure necessary for the development of industrial and commercial enterprises.

The agreement provides funding for the development of a 30 ha industrial park in Corner Brook, the construction of a direct access road from the Trans-Canada Highway south of the city to the park and on to the downtown waterfront, and the construction of a direct access road from the Stephenville industrial area and the Port au Port highway system to the Trans-Canada Highway.

During 1983-84, with the eastern 10 km of the Corner Brook access road already paved and opened to traffic, grading on the final 4.5 km was completed and base course paving done. Construction of the industrial park was essentially completed by year end, with only testing of the water mains and reservoir to be done. Lots have been placed on sale.

The 23 km Stephenville access road was completed and opened to traffic in 1982-83.

Industrial Development - Phase II

Duration: 03/06/83 to 31/03/88

Costs shared by:

DRIE	\$ 17 800 000
Provincial government*	Nil
Total estimated cost	\$ 17 800 000

* The Province furnishes the sites for the projects

DRIE expenditures to date	\$ 200 830
DRIE expenditures to date	\$ 200 830

This agreement continues and expands support for economic development in the province begun under an earlier federal/provincial agreement, including Industrial Development - Phase I, through the provision of industrial infrastructure in selected communities in central and western Newfoundland, thereby enhancing the climate for the establishment and/or expansion of industrial and commercial enterprises.

The agreement provides funding for the construction of a 9 ha industrial park and a multi-tenant industrial mall at Port aux Basques, a multi-tenant industrial mall at Pasadena, a 25 ha industrial park at Windsor and a 44 ha industrial park at Gander. Canada is implementing the projects with the province supplying the sites and accepting responsibility for ongoing operation, maintenance and repair of the completed facilities. The agreement also provides funding for promotion of the developments and for industrial studies.

Public Works Canada is implementing the capital works on DRIE's behalf and has appointed design consultants for four of the five projects. The consultants have been gathering pertinent site information and liaising with regulatory authorities and other interested parties. Preliminary designs for Port aux Basques and Gander parks have been approved by PWC and DRIE and work on detailed design is underway. Tender calls for both are scheduled for June, 1984. All projects, except the Port aux Basques mall, should be under construction in 1984-85.

A supply/demand study of industrial land on the Avalon and Burin Peninsulas is now underway.

Institute of Fisheries and Marine Technology

Duration: 16/05/83 to 31/03/87

Costs shared by:

DRIE	\$ 27 500 000
Provincial government	14 500 000
Total estimated cost	\$ 42 000 000

DRIE expenditure to date	\$ 1 725 414
DRIE expenditure 1983-84	\$ 1 725 414

This agreement supports the establishment of the Newfoundland Institute of Fisheries and Marine Technology, thereby enhancing the capability to meet the skilled training needs of people and industry with respect to the fisheries, marine, offshore oil and gas and industrial sectors, both provincially and regionally.

The agreement provides funding for the construction and equipping of a 20 000-square-metre building on a 17 ha site on Ridge Road in St. John's to accommodate some 1 000 students. The facility will include a flume tank which will aid in the design, experimentation and operations training for new fishing gear aimed at improving catching efficiency and energy conservation.

The Institute is being built under a construction management arrangement. Work was begun in summer, 1983, and following extensive site preparation, municipal services were installed and building foundations completed by year end. By that time structural steel erection was also well underway. Contracts for all major work items have been awarded. If the present construction schedule can be maintained, much of the building will be ready for occupancy by fall, 1985.

Tourism Development

Duration: 01/01/78 to 31/03/84

Costs shared by:

DRIE	\$ 11 938 140
Provincial government	1 326 460
Total estimated cost	\$ 13 264 600

DRIE expenditure to date	\$ 11 380 724
DRIE expenditure 1983-84	\$ 1 523 141

This comprehensive tourism development agreement is designed to improve the efficiency of tourism marketing and visitor information programs, to develop tourist attractions, and to encourage the expansion of visitor accommodations.

Projects include restoration of the Grenfell and Bradley historic houses; building tourism chalets in western and eastern Newfoundland; the restoration of the houses, churches and stores in

the historic village of Trinity; upgrading and extending tourist campground accommodations; and a financial incentive program for hotel and motel operations.

OTHER PROGRAMS

Fishing Equipment Manufacture/Assembly Market Study

1. Total Study Cost \$36,945.00
2. Expenditure in 1983-84 \$17,786.93
3. The proximity of Burin Peninsula to some of the world's most prolific fishing grounds coupled with the refurbishment of the trawler fleet, provides opportunity for the diversification of the Peninsula's economic base.

The market study involves an analysis of the fishing equipment market and the opportunities available to residents of the Burin Peninsula in the manufacture assembly of such equipment.

Industrial and Regional Development Program (IRDP)

The Industrial and Regional Development Program came into place during 1983-84, replacing RDIP and a number of other programs. Activities under this program for the period it was operating were as follows:

Net accepted offers	20
Number of jobs expected to be created	285.5
Eligible capital investment associated with offers	\$ 8 601 054
DRIE commitment through these offers	\$ 1 643 017
Total payments 1982-83	\$ 700 487

Regional Development Incentives Program (RDIP)

The Regional Development Incentives Program was phased out in 1983-84. Activities under this program for the period it was operating were as follows:

Net accepted offers	5
Number of jobs expected to be created	32.5
Eligible capital investment associated with offers	\$ 2 791 314
DRIE commitment through these offers	\$ 806 623
Total payments 1982-83	\$ 1 889 616

Canada Fisheries Development Program Labrador

Duration: 01/04/81 to 31/03/87

Total estimated cost \$ 13 500 000

DRIE expenditure to date \$ 5 542 000

DRIE expenditure 1982-83 \$ 1 202 000

The program is delivered unilaterally through DRIE/DFO.

The program is intended to increase efficiency in the harvesting, landing, processing and storage of fish. To date two ice-making machines have been installed, as well as two bait/fish holding units and eight fish unloading systems.

In addition, fish plants at Rigolet, Makkovik and Square Islands have been modernized and community stages have been provided at West St. Modeste and Square Islands.

Projects involving fish plants are cost-share 50:50 with the plant owner/operator, while other projects are financed 100 per cent by the federal government.

PRINCE EDWARD ISLAND

On October 7, 1981, the federal government announced a three-year (April 1, 1981, to March 31, 1984) \$92 million package of economic development programs for Prince Edward Island. The package included a \$53 million cost-sharing agreement with the province for the third and final phase of the 15-year Comprehensive Development Plan Agreement and the \$39 million Federal Development Strategy for Prince Edward Island that provided for coordinated implementation of federal programs designed specifically for the province.

The Federal Development Strategy, which involves the participation of five federal departments including DRIE, provided the framework for continued federal contribution to economic development on Prince Edward Island after termination of the Comprehensive Development Plan Agreement in 1984.

A Federal Management Committee, chaired by the Minister of State for Economic and Regional Development and having representation from the Departments of Regional Industrial Expansion

Agriculture, Transport, Fisheries and Oceans, and Energy, Mines and Resources, was established by Treasury Board to ensure co-ordination of program planning.

DRIE expenditures during 1983-84 under the Comprehensive Development Plan totalled \$8 160 560 and the Federal Development Strategy for Prince Edward Island totalled \$8 152 417.

SELECTED DRIE PROGRAMS UNDER THE FEDERAL DEVELOPMENT STRATEGY

Small Business Assistance Program

The objectives of the program were to encourage the development of the small business sector on Prince Edward Island by providing financial assistance for capital projects which were not currently eligible for assistance under existing federal programs, and to generate employment and income opportunities within the small business sector.

During the year 37 applicants accepted offers of assistance totalling \$615 374.

Community Industrial Support Program

The objective of the program was to encourage Area Industrial Commissions in Prince Edward Island to promote, coordinate and implement economic development activities in the communities within their jurisdiction.

During the year three applicants accepted offers of assistance totalling \$794 247.

Tourism Incentives: Financial Assistance Program

The objective of this program was to assist the private sector to increase and improve the quality and quantity of tourist facilities and services in Prince Edward Island.

During the year 103 applicants accepted offers of assistance totalling \$1 639 814.

Tourism Destination Program

The objective of this program was to encourage the development of major tourism destinations, particularly in the eastern and western regions of the province.

During the year two applicants accepted offers of assistance totalling \$1 709 125.

Industrial Development Program

The objective of this program was to improve productivity and efficiency and thereby provide a stimulus for industrial growth.

During the year 26 applicants accepted offers of assistance totalling \$298 909.

SELECTED PROGRAMS UNDER THE COMPREHENSIVE DEVELOPMENT PLAN

Agriculture

Agriculture programs in 1983-84 continued to help farmers to expand, modernize and diversify. In addition, extension programs provided encouragement to farmers to adopt modern business techniques through advanced technology.

Market and Product Development

This program helped to finance the Market Development Centre which assists producers, processors, and manufacturers in gaining access to the marketing services necessary to compete more successfully. In addition, it promotes new products, develops sales methods, and assists in improving sales of Island products in new markets.

Tourism

During the year assistance was provided to develop the tourism sector through cost-shared projects in marketing and sales promotions.

Power and Energy

Six projects involving wood fuel use on Prince Edward Island were undertaken. Three of these were system conversions using wood chip fuel, and the other three were studies for future conversion systems.

A two-year project was completed on Farm Energy Conservation and Energy Alternatives.

Extension of three-phase power to isolated industries was continued.

NOVA SCOTIA

Promotion and Implementation of the Industrial and Regional Development Program (IRDP) were priority activities during the year. Also, the regional office worked more closely with the Federal Business Development Bank (FBDB); the Business Information Centre was transferred to FBDB and officers of the bank worked on IRDP assessment in the DRIE office.

Major modernization programs underway throughout Nova Scotia continued to be possible through federal provincial agreements covering the pulp and paper industry, the Sydney Steel Corporation and Michelin plants. At Michelin, productivity improvements include the introduction of CAD/CAM facilities, while the Sydney Steel Corporation will soon be equipped with a reconstructed blast furnace and a modernized rolling mill. In the pulp and paper sector, federal-provincial investment of \$21 million has resulted in private sector investment of approximately \$125 million and has helped to ensure maintenance of competitive positions for the industry.

Assistance was also continued, through federal-provincial agreements, for infrastructure in the Strait of Canso, the Panamax Dry Dock in Halifax and for Ocean Industry Development.

Industrial development activities included the formulation of policies, identification of opportunities, promotion of the transfer of technologies to Nova Scotia and the encouragement of joint ventures between the private sector and the research establishment.

One such venture -- supported by DRIE -- is the institution-industry collaboration between Selmac Limited and Dalhousie University to form a new company -- Focal Marine -- to develop the marine uses of fibre optics.

The Nova Scotia regional office supported the Advanced Microelectronics Institute, the Canadian Fisheries Institute of Technology, the Atlantic Coal Institute and the International Centre for Ocean Development. Development officers also actively pursued opportunities for the formation of other research and development institutions.

In the marketing area, trade development, including the first Canada Export Trade Month, was a priority. Efforts were also directed at expanding local participation in large projects and government contracts.

Research and development and innovative projects were actively encouraged. Support was provided, for example, to Micronav Limited of Sydney to develop a new aircraft approach and landing system. The system, called the Microwave Landing System, has been adopted by International aviation authorities as the future landing aid at airports around the world.

DRIE's Ocean Industry Development Office was, during 1983-84, at the forefront of efforts to establish Nova Scotia as a centre of excellence in the ocean industry sector.

During the year, DRIE assistance encouraged many firms to locate in Nova Scotia and some, such as Canadian Diamant Boart, which manufactures diamond drill bits, brought new technologies to the province. DRIE assistance also enabled many Nova Scotia manufacturing and processing companies to expand their operations.

Following is a brief description of activities under subsidiary agreements and other programs in 1983-84.

SUBSIDIARY AGREEMENTS

Strait of Canso Area Development

Duration: 31/03/75 to 30/06/84

Costs shared by:

DRIE	\$ 22 503 400
Provincial government	7 554 100
Total estimated cost	<u>\$ 30 057 500</u>

DRIE expenditure to date	\$ 21 049 956
DRIE expenditure 1983-84	\$ 668 524

The agreement is designed to equip the Strait of Canso region with support infrastructure to enhance the value of its deep-water port and other industrial location attributes. Current development efforts are concentrated on supply base support for offshore gas activity, service and other spinoffs from this industry and heavy industry prospects. Funds are provided to maintain a promotion and development agency, the Strait of Canso Development Authority.

Halifax Panamax Dry Dock

Duration: 22/01/80 to 31/03/85

Costs shared by:

DRIE	\$ 43 900 000
Provincial government	13 700 000
Total estimated cost	<u>\$ 57 600 000</u>

DRIE expenditure to date	\$ 43 368 764
DRIE expenditure 1983-84	\$ 128 048

The agreement calls for joint participation in a program to provide key marine infrastructure to the port of Halifax, particularly a Panamax-type floating dry dock, dock mooring and servicing facilities, and ancillary equipment for ship repair and metal fabrication. Construction of the floating dry dock and related infrastructure is complete.

Assistance to Michelin Tires (Canada) Ltd.

Duration: 07/06/80 to 31/12/90

Costs shared by:

DRIE	\$ 42 000 000
Provincial government	14 000 000
Total estimated cost	<u>\$ 56 000 000</u>

DRIE expenditure to date	\$ 29 000 000
DRIE expenditure 1983-84	\$ 29 000 000

Providing assistance for the company's facilities at Granton and Bridgewater, Nova Scotia, the agreement also enables the company to implement significant productivity improvements, including CAD/CAM facilities at its two original plants, and to establish a new tire manufacturing plant at Waterville, Nova Scotia.

Modernization of Facilities at the Sydney Steel Corporation

Duration: 01/04/81 to 30/06/84

Costs shared by:

DRIE	\$ 77 000 000
Provincial government	19 250 000
Total estimated cost	<u>\$ 96 250 000</u>

DRIE expenditure to date	\$ 46 830 368
DRIE expenditure 1983-84	\$ 33 009 516

The objectives of the agreement are to assist the province to maintain employment levels consistent with efficient plant operations and to improve the financial position at the Sydney Steel Corporation through the provision of a capital works program which will ensure a physical plant capable of working efficiently.

The reconstructed blast furnace will be commissioned in September 1984.

Pulp and Paper Modernization

Duration: 23/05/81 to 31/03/84

Costs shared by:

DRIE	\$ 17 000 000
Provincial government	4 250 000
Total estimated cost	<u>\$ 21 250 000</u>

DRIE expenditure to date	\$ 7 722 489
DRIE expenditure 1983-84	\$ 5 264 956

Capital investment of approximately \$125 million, in mill modernization, pollution abatement, and energy cost-reduction projects, was encouraged by incentives provided under this agreement, which assisted Nova Scotia mills to maintain their competitive position and to enable them to meet current pollution-control requirements. Incentives have been approved for three companies and implementation is on schedule.

Ocean Industry Development

Duration: 24/07/81 to 24/07/86

Costs shared by:

DRIE	\$ 22 950 000
Provincial government	12 050 000
Total estimated cost	<u>\$ 35 000 000</u>

DRIE expenditure to date	\$ 5 010 958
DRIE expenditure 1983-84	\$ 4 114 235

This agreement, the first major initiative in Canada relating to ocean industry, consists of two groups of programs funded individually by the federal and provincial governments and carried out jointly under the umbrella of the General Development Agreement (GDA). The objectives of the agreement are to stimulate the growth of a complex of medium- to high-technology ocean manufacturing and service industries and to provide support for applied research and technology transfer to enable Nova Scotia to become a true centre of excellence in the ocean industry sector.

The federal program consists of capital and marketing assistance grants, assistance for ocean industry trade associations, an incubator mall for fledgling ocean industries, and an Ocean Industry Development Office to undertake promotion, development and coordination of federal programs. The provincial program provides grant assistance for municipal taxes, development of an ocean industry park, and an innovation centre to provide business management and advice to ocean industries.

OTHER PROGRAMS

Regional Development Incentives Program

Activity under the Regional Development Incentives Program during the fiscal year was as follows:

Net accepted offers	21
Number of jobs expected to be created	346
Eligible capital investment associated with offers	\$ 8 302 382
DRIE commitment through these offers	\$ 3 171 686
Total payments 1983-84	\$ 7 203 963

Industrial and Regional Development Program

Activity under the Industrial and Regional Development Program (IRDP) from its inception (July 1983) to the end of the fiscal year was as follows:

Net accepted offers	19
Number of jobs expected to be created	351
Eligible capital investment associated with offers	\$ 8 544 234
DRIE commitment through these offers	\$ 2 386 071
Total payments 1983-84	\$ 59 888

Program for Export Market Development

Activity under the Program for Export Market Development (PEMD) during the fiscal year was as follows:

Applications approved	103
DRIE commitment	\$ 532 205

NEW BRUNSWICK

During 1983-84 the New Brunswick region gradually adapted to the series of changes which followed the setting up of the new department. In addition to a new mandate, a new Industrial and Regional Development Program and a new organizational structure, these changes also entailed the dismantling of the Atlantic regional office and the relocation of the provincial office from Fredericton to Moncton.

The provincial office at Moncton was assisted in its task of implementation by three local offices situated at Bathurst for the northeast, Cocagne for the southeast and Fredericton for the southwest and the centre of the province. The Fredericton office is also responsible for the administration of the trade, tourism and regional activities sectors.

The following is a brief description of activities in 1983-84, including the agreements still in force and the programs providing assistance to industry and exports.

SUBSIDIARY AGREEMENTS

Northeastern New Brunswick

Duration: 23/06/77 to 31/03/85

Costs shared by:

DRIE	\$ 67 175 000
Provincial government	28 325 000
Total estimated cost	\$ 95 500 000

DRIE expenditure to date	\$ 52 410 000
DRIE expenditure 1983-84	\$ 6 523 169

The aim of this agreement is to improve the long-term prosperity and living standard of the population of this region through increased recourse to programs that promote the use of human and material resources and make it possible to speed up the rate of development.

Discussions were held during the fiscal year between the province and DRIE to identify activities that could be undertaken, using the balance of the funds of the subsidiary agreement on northeastern New Brunswick.

Among the projects approved were CAD/CAM at the Bathurst Community College (\$1.6 million); the SMB service centre (\$375 000); SMB grant - data processing (\$230 000); wood drier - Restigouche (\$240 000); peat research centre (\$355 000); tourism co-ordinator (\$165 000).

To enable these projects to be implemented, a one-year extension was also approved, bringing the end of this agreement to March 31, 1985.

Pulp and Paper

Duration: 27/08/80 to 31/03/84

Costs shared by:

DRIE	\$ 43 000 000
Provincial government	10 750 000
Total estimated cost	\$ 53 750 000

DRIE expenditure to date	\$ 28 862 900
DRIE expenditure 1983-84	\$ 5 121 950

Seven of the province's mills have received offers of assistance under the agreement. Based on planned expenditures exceeding \$500 million through March 1986, incentive assistance will total \$53.25 million (\$42.6 million federal).

The Boise Cascade Canada Ltd. pulp mill at Newcastle will receive a \$4 million incentive toward modernization. Boise Cascade will invest \$41 million for capital improvements in the areas of process modernization, pollution abatement and energy conservation.

NBIP Limited has received \$12.5 million toward modernization of its newsprint mill at Dalhousie. Total cost of the company's modernization project was \$160.4 million.

St. Anne Nackawic Pulp and Paper Ltd. will receive a \$5 million incentive toward its pulp mill modernization. Total cost of the company's modernization project is \$62.2 million.

Fraser Incorporated of Edmundston will receive a \$17 million incentive in support of a \$169 million modernization of its Atholville mill. The three-pronged modernization program encompasses updating of equipment, pollution control and measures to improve efficiency of energy use.

Lake Utopia Paper Ltd. will receive \$2.5 million towards a \$17 million modernization of its mill located near St. George. The investment program is aimed at cost reduction, energy conservation and improved pollution abatement facilities.

Irving Pulp & Paper Ltd. will receive \$6.75 million in support of a \$70 million capital program to modernize its kraft pulp mill in Saint John. Major improvements are under way in the areas of process control, energy conservation and pollution abatement.

Rothsay Paper Ltd. will receive \$5.5 million towards a \$34 million program to upgrade its Saint John newsprint mill. Capital expenditures will focus on quality improvement and cost reduction.

Modernization of the Consolidated - Bathurst Inc. Facility at Bathurst, New Brunswick

Duration: 30/03/82 to 31/03/89

Costs shared by:

DRIE	\$ 19 600 000
Consolidated-Bathurst	175 000 000
Provincial government	4 900 000
Total estimated cost	<u>\$199 500 000</u>

DRIE expenditure to date	\$ 11 760 000
DRIE expenditure 1983-84	\$ 1 865 950

The agreement is to be the catalyst for modernization investment of \$175 million by Consolidated-Bathurst Inc. Under the modernization plan, the kraft operation at the Bathurst mill has been terminated. In its place, the company constructed a 400-tonne-per-day thermo-mechanical pulp plant, at a cost of \$100 million. The plant commenced production in late 1983.

During the period from 1981 to 1987, \$7 million will be spent upgrading the corrugating medium plant. An additional \$60 million will be spent to buy a new corrugating medium machine that will start production in 1988.

The entire plant will be brought up to federal-provincial environmental standards at an estimated cost of \$10 million.

Sulphation Roast Leach Pilot Plant

Duration: 30/09/83 to 31/03/87

Costs shared by:

DRIE	\$ 15 000 000
Provincial government	3 750 000
Total estimated cost	<u>\$ 18 750 000</u>

DRIE expenditure to date	\$ 1 500 000
DRIE expenditure 1983-84	\$ 1 500 000

This agreement is designed to provide relief of constraints on the processing of base metals so as to increase the economic viability and potential of existing mining operations in New Brunswick, by constructing a 10-ton per day pilot plant for the testing of the Sulphation Roast Leach Electrowinning technique for improving the recovery of base metals. Funds were provided as part of the Special Recovery Capital Projects Program (SRCPP) initially announced in May, 1983.

During the 1983-84 fiscal year, a vacant industrial building was purchased in the Chatham area and renovations were initiated. In addition, the design engineering was contracted out and pieces of major equipment were purchased.

OTHER PROGRAMS

Southeast New Brunswick Development Initiative

Duration: 25/08/81 to 31/03/86

Through separate submissions by each participating department, funding was approved by Treasury Board covering the period 1981/82 to 1985/86 as follows:

DRIE	\$ 3 700 000
Agriculture Canada	3 600 000
Fisheries & Oceans	<u>2 700 000</u>
Total	\$ 10 000 000
DRIE expenditure to date	\$ 71 000
DRIE expenditure 1983-84	\$ 71 000

The DRIE component includes \$1.2 million to operate the recently established SENB Development Office in Cocagne and \$2.5 million for the two financial assistance programs.

The objectives of the Industrial development program are to increase productivity and market potential for local entrepreneurs. The tourism development program contributes to increased revenues and employment in the tourism sector by supporting tourist attractions, restaurants and related accommodations.

The DRIE component was started in October 1983. During the second half of 1983/84, 11 industrial projects received offers of \$117 000 on total investments of \$224 000. The total contribution for this fiscal year was \$22 600.

Under the tourism development program, 20 offers were made committing \$363 000 to projects with total investments of \$887 000. The total contribution for 1983-84 was \$48 400.

Tourism

Through the reorganization of DRIE, a tourism unit was formally placed in the New Brunswick region during 1983-84.

The tourism unit undertook strategic planning to identify regional tourism opportunities and sectoral constraints which could be addressed in the context of a program proposal. It is anticipated that a tourism initiative could result from the planning exercise during the coming year.

The tourism unit participated in sub-regional/area studies to help develop tourism plans such as the McAdam Tourism Conceptual Plan, to provide identification of tourism opportunities for program targetting such as the Southeast New Brunswick Tourism Development Study, and to provide project feasibility and conceptual analysis of proposals such as Pays de la Sagouine.

Trade

The trade unit contributed to regional economic development and job creation by assisting New Brunswick firms in pursuing new export opportunities. Provincial exports increased by 14 per cent in 1983 from \$1.46 billion in 1982 to \$1.67 billion in 1983.

A greater utilization of the PEMD program occurred with 54 projects approved, which represents an 86 per cent increase over 1982/83 and \$210 000 committed which represents a 126 per cent increase over 1982/83.

Under the Promotional Projects Program, the unit facilitated the participation of over 200 New Brunswick firms in trade shows, incoming and outgoing missions and promotions. Many firms participated in more than one activity.

A close working relationship with industry has been established to locate markets for their products, overcome constraints and problems in exporting and counsel them on exporting. Also, sourcing of products and services for international markets which were being sought through our consultants and embassies abroad was a major ongoing activity. Over 250 contacts per month were made through these activities.

QUEBEC

The year 1983-84 was marked by the setting up of the Department of Regional Industrial Expansion and the implementation of the Industrial and Regional Development Program (IRDP).

In Québec DRIE's expenditures in 1983-84 totalled more than \$297 million. They were channelled through various programs formerly under ITC/DREE responsibility. Of the total, \$44 million was spent within the context of federal-provincial agreements, while the balance of \$253 million was given in the form of contributions and grants under various industrial assistance programs. Expenditures under the agreement to modernize the pulp and paper industry amounted to \$26 million, the largest disbursement under this agreement since its announcement in 1979.

The Defence Industry Productivity Program (DIPP) and the Shipbuilding Industry Assistance Program (SIAP) generated total cash disbursements in the order of \$91 million.

Under the DIPP program, two major projects were given priority in 1983-84. The first was the establishment in Québec of a plant to manufacture light twin-engine helicopters by Bell Helicopter Textron Inc. This important project will require a total investment of \$514.2 million and will lead to the creation of 2 775 jobs (annual average).

The federal government is participating in this project for a total of \$165.2 million. The establishment of Bell Helicopter in Québec represents an important phase in the creation of a high-technology industry in Canada related to the manufacture of helicopters.

The second project involved the signing of a long-term joint agreement by the federal government and Pratt & Whitney Canada, in October 1983, to subsidize 12 new research, development and productivity improvement programs. These programs, together with the resulting engine manufacturing projects, will create 6 000 new jobs in the high-technology sector and increase sales by \$20 billion. Over the next ten years, a total of \$1.7 billion will be invested, including \$468 million by the federal government.

SUBSIDIARY AGREEMENTS

Industrial Infrastructure

Duration: 26/03/75 to 30/04/84

Cost shared by:

DRIE	\$ 82 602 000
Provincial government	55 068 000
Total estimated cost	<u>\$137 670 000</u>

DRIE expenditure to date	\$ 60 482 000
DRIE expenditure 1983-84	\$ 7 868 000

This agreement involves a program of financial assistance to municipalities wishing to develop or improve their industrial infrastructures. The assistance has encouraged the creation and expansion of industrial parks and the setting up of well equipped industrial fishery parks in the Gaspé and on the North Shore. Municipalities without the necessary infrastructure for the establishment of an industrial enterprise have also been able to benefit from assistance under the agreement.

Since the agreement has now expired, all the funds allocated to it have been committed to specific projects, several of which are still in progress.

Tourism Development

Duration: 06/04/78 to 31/03/84

Cost shared by:

DRIE	\$ 69 600 000
Provincial government	66 400 000
Total estimated cost	<u>\$136 000 000</u>

DRIE expenditure to date	\$ 50 613 000
DRIE expenditure 1983-84	\$ 9 688 000

The general objectives of this agreement are to increase and diversify tourist attractions in order to increase the number of foreign tourists and to encourage Québécois to make greater use of the tourist facilities in their province. Work progressed under programs to develop tourist parks, restore buildings and historical sites, modernize museums, establish tourist stops and set up outdoor centres and holiday camps.

During the year, the governments reallocated the balances available under the agreement to projects that could be begun or accelerated during the fiscal year. Among such projects were the old wood pulp mill at Chicoutimi, the Roberval aquatic centre, and the Mont-Valin ski centre.

Modernization of the Pulp and Paper Industry

Duration: 15/05/79 to 31/03/84

Cost shared by:

DRIE	\$135 000 000
Provincial government	105 000 000
Total estimated cost	<u>\$240 000 000</u>

DRIE expenditure to date	\$ 64 095 000
DRIE expenditure 1983-84	\$ 25 835 000

The pulp and paper industry is the most important sector of the Québec forestry industry. For some years, however, the industry had seen its competitive position decline on both the domestic and foreign markets.

Thanks to this agreement, however, the two governments enabled the pulp and paper industry to modernize its plants, thereby improving their ability to compete. To encourage businesses to invest more, they are given financial assistance in the form of direct grants up to a possible maximum of 25 per cent of eligible assets. The authorized grants are mainly for projects aimed at reducing production costs, increasing the added value of finished projects and encouraging protection of the environment.

In 1983-84 the funds available under the agreement's budget of \$240 million were committed in the form of grants to 23 Québec businesses involving 39 plants. Among these businesses and plants were Domtar in Donnacona, Donohue in Clermont, Reed in Limoulu, James McLaren in Masson and Papier Q.N.S. in Bale-Comeau. A number of C.I.P., Abitibi-Price and Consolidated-Bathurst plants also benefitted from grants under this agreement.

La Société Inter-Port de Québec

Duration: 03/07/81 to 31/03/86

Costs shared by:

DRIE	\$ 5 550 000
Provincial government	3 700 000
Total estimated cost	\$ 9 250 000

DRIE expenditure to date	\$ 2 419 000
DRIE expenditure 1983-84	\$ 917 000

The Société Inter-Port (SIP) is an agency concerned with promotion and industrial development in the Québec City area; it places the emphasis on projects that are likely to derive benefit from the port installations. The SIP is owned 60 per cent by the Québec government and 40 per cent by the federal government. However, according to the terms of the federal-provincial agreement, the federal government's participation in investments amounts to 60 per cent, while that of the provincial government is 40 per cent.

The SIP's objectives are, basically, the diversification and strengthening of the economic structure of the Québec City urban area and the encouragement of job creation. It supports the private sector and stimulates investments which have an impact on the regional economy.

In 1983-84 the Canada-Québec Subsidiary Agreement on the Société Inter-Port de Québec, which was to expire on March 31, 1984, was extended for two years under amendment No. 2, dated March 30, 1984.

The extension will enable the SIP to continue its search for new industries and to provide access for the Québec City area to the world investment market. Furthermore, this decision will make it possible to reallocate and make further use of the available funds.

During the three years it has been in operation, the SIP has shown its value through, among other things, its work among metropolitan Québec City industrial development agencies, the establishment of a promotional team whose main task is to attract investment from abroad, the setting up of export consortiums and the acquisition of land for industry.

Because of the activities of the SIP to stimulate the economy of the Québec City area in 1983-84, it was possible to support, through the injection of \$400 000 in risk capital, the growth and development of a high-technology firm in the area, whose products offer good potential for exports throughout the world.

Special mention should be made of its involvement with the Groupe d'action pour l'avancement technologique et industriel de la région de Québec (GATIQ) which is involved specifically in the establishment and promotion of an optics and laser research institute in the Québec City metropolitan area.

REGIONAL DEVELOPMENT INCENTIVES PROGRAMS

Regional Development Incentives Act

During the 1983-84 fiscal year, the following activities resulted from the Regional Development Incentives Act:

Net accepted offers	168
Number of jobs expected to be created	2 220
Eligible capital investment associated with offers	\$ 91 652 000
DRIE commitment through these offers	\$ 19 769 000
Total payments 1983-84	\$ 29 146 000

Montréal Special Area

The purpose of this program is to speed up the development of the Québec industrial structure by reinforcing the role of the Montréal area as the province's manufacturing growth centre.

During the year of the study, the program gave rise to the following activities:

Net accepted offers	79
Number of jobs expected to be created	2 407
Eligible capital investment associated with offers	\$108 951 000
DRIE commitment through these offers	\$ 18 839 000
Total payments 1983-84	\$ 34 869 000

During the 1983-84 fiscal year, DRIE expenditures in Québec under the regional development incentives programs amounted to \$64 million, \$34.9 million of which was paid in connection with the Montréal Special Area Industrial Incentives Program.

OTHER PROGRAMS

Economic Development Program for the Magdalen Islands

Compared to the other areas of Québec, the Magdalen Islands have not attained a level of economic development sufficient to reduce the chronic unemployment prevalent there. The weak

economic growth is due in part to the area's geographic location. Conscious of the problem, the former Department of Regional Economic Expansion, together with other federal departments, implemented a program aimed essentially at improving the living conditions of the islands' population and the creation and maintenance of permanent jobs which would reduce the unemployment rate and the exodus of the population.

The initial program represented a commitment of \$13.7 million, augmented by \$5.6 million during the 1982-83 fiscal year. The program is divided into seven components, three of which were to be implemented by the Departments of Fisheries and Oceans, Transport and Agriculture. The other four components are the responsibility of DRIE and provide for financial assistance to businesses in manufacturing and tourism, economic development initiatives and economic studies.

The program of industrial incentives resulted in the following activities during the 1983-84 fiscal year:

Net accepted offers	6
Number of jobs expected to be created	59
Eligible capital investment associated with offers	\$ 1 259 000
DRIE commitment through these offers	\$ 629 000
Total payments 1983-84	\$ 241 000

Industrial and Regional Development Program

Net accepted offers	106
Number of jobs expected to be created	2 808
Eligible capital investment associated with offers	\$ 56 713 000
DRIE commitment through these offers	\$ 15 372 000
Total payments 1983-84	\$ 138 000

St. Lawrence Nautical Infrastructures Assistance Program

The aim of the program is to provide Québec with a minimum network of ports of refuge on the St. Lawrence in order both to expand the reception infrastructure for the events connected with Québec's 450th anniversary and, over the longer term, to attract a larger number of Canadian and American pleasure craft to the St. Lawrence.

This program is undertaken in cooperation with the Public Works Department and Fisheries and Oceans Canada. Its objective is to create six new ports, increasing from 500 to 600 the places available to pleasure craft, and to restore five other ports of refuge.

The following ports have received or will receive contributions under this program:

- ° Bale-Comeau
- ° Cap-à-l'Aigle
- ° Gaspé
- ° Ile-aux-Coudres
- ° Lévis
- ° Neuville
- ° Sept-Iles
- ° Sillery
- ° Saint-Laurent/Ile d'Orléans
- ° Tadoussac
- ° Berthier.

It should be noted that some work has been carried out under the federal Direct Employment Development Program.

Eastern Québec Tourist Development Program

This program forms part of the Canada-Gaspé and Lower St. Lawrence Development Plan, announced on May 5, 1983, and intended to improve the economic development outlook in eastern Québec. The program seeks to:

- ° encourage the development, modernization and consolidation of accommodation infrastructures in this area;
- ° develop tourist attractions likely to draw tourists, encourage the organization of package tours and promote major tourist events.

The department is to pay out over \$14 million under the auspices of this program over the next five years.

ONTARIO

The introduction of the Industrial and Regional Development Program (IRDP), in the summer of 1983, resulted in necessary adjustments to staffing and procedures, the replacement of several existing programs by IRDP, and an emphasis on "direct delivery" programs to industries that stress modernization and innovation.

To provide increased reach and service capability to such companies in one of Canada's most prominent industrial regions, DRIE opened its southwestern Ontario branch office late in 1983 in London, Ontario, making it the third branch office in the province (with Thunder Bay and Sudbury).

In support of the first annual Export Trade Month last October, DRIE conducted export seminars across Ontario and made appearances at various meetings and conferences. During the summer 10 specially-trained university students, hired under the Summer Youth Employment Program, were placed in centres across the province with a mandate to assist manufacturers with their export-marketing efforts.

During 1983-84, departmental expenditure in the Ontario region totalled \$121.7 million. Included in this figure are program expenditures of \$97.7 million for direct-delivery industrial incentives programs, and \$15.9 million in Canada-Ontario subsidiary agreements.

SUBSIDIARY AGREEMENTS

As of March 31, 1984, 12 subsidiary agreements had been signed under the Canada-Ontario General Development Agreement (GDA). Six of these were active during the period covered. One of these, the Sault Ste. Marie Infrastructure Subsidiary Agreement, was managed by Public Works Canada; the Forest Management Subsidiary Agreement was managed by Environment Canada.

Single Industry Resource Communities (SIRC)

Duration: 18/10/76 to 31/03/84

Costs shared by:

DRIE	\$ 9 383 630
Indian Affairs and Northern Development	314 908
Transport Canada	150 000
Canada Mortgage and Housing Corp.	366 462
Provincial government	9 585 000
Total estimated cost	\$ 19 800 000

DRIE expenditure to date	\$ 9 344 238
DRIE expenditure 1983-84	\$ 800 000

This agreement, designed to diversify and stabilize the economies of single-industry resource communities in northern Ontario and to initiate programs aimed at easing the social and economic problems characteristic of single-industry towns, comprised six major infrastructure programs.

All projects under the various program elements have been completed, and virtually all funding allocations have been expended as of March 31, 1984 — the date when this agreement terminated.

Pulp and Paper Industry Facilities Improvement

Duration: 15/05/79 to 31/03/84

Costs shared by:

DRIE	\$ 62 700 000
Provincial government	125 400 000
Total estimated costs	\$188 100 000

DRIE expenditure to date	\$ 58 184 000
DRIE expenditure 1983-84	\$ 6 575 000

Designed to stimulate private sector investment in the province's pulp and paper industry through incentives for mill modernization, energy conservation and pollution-abatement measures, the industry responded with an investment estimated at \$1.3 billion.

DRIE's contribution of \$60 million to this program has been a vital factor in spurring this corporate development. The agreement terminated on March 31, 1984.

Northern Rural Development (NORDA)

Duration: 02/03/81 to 31/03/84

Costs shared by:

DRIE	\$ 9 250 000
Indian Affairs and Northern Development	750 000
Provincial government	8 500 000
Total estimated cost	\$ 18 500 000

DRIE expenditure to date	\$ 4 530 000
DRIE expenditure 1983-84	\$ 2 373 000

NORDA's aim has been to expand and diversify the economic base of northern rural Ontario by stimulating small-scale entrepreneurial activity and to provide financial assistance for a wide variety of economic activities covering agriculture, natural resources, tourism and the development of small business.

In addition a \$1.5 million component of the agreement funded native projects. This was cost-shared by DRIE and the Department of Indian Affairs and Northern Development.

By March, 1984, a total of 547 projects were approved for assistance, representing a federal commitment of approximately \$9.8 million. These projects are expected to create 2 800 jobs.

Eastern Ontario (EOSA)

Duration: 20/12/79 to 31/03/84

Costs shared by:

DRIE	\$ 25 175 000
Provincial government	25 175 000
Total estimated cost	<u>\$ 50 350 000</u>

DRIE expenditure to date	\$ 19 219 284
DRIE expenditure 1983-84	\$ 1 333 200

The agreement is designed to help stabilize, diversify and expand the economic base of rural eastern Ontario by developing and ensuring the long-term viability of the natural resource base, and by stimulating private investment in the region. Assistance has been allocated for agriculture, forestry, minerals, tourism and small business incentives.

Approximately \$1 million of federal-provincial funds in forgivable loans was offered to 26 enterprises during the 1983-84 fiscal year.

As a result of these incentives, \$3 million of private sector investment was levered, creating potential for establishing 500 full-time jobs.

Forest-renewal operations continued to provide part-time employment for local residents during winter months. Gradiometer-survey technology, transferred from government to the private sector, stimulated mineral exploration through air surveys.

Early in 1984 this agreement, originally scheduled to end on March 31, 1984, was extended by six months to allow for outstanding applications to be processed. No further funds were allocated to the program.

Community and Rural Resource Development (CRRD)

Duration: 07/12/77 to 31/03/85

Costs shared by:

DRIE	\$ 13 828 000
Provincial government	15 675 000
Total estimated cost	<u>\$ 29 523 000</u>

DRIE expenditure to date	\$ 8 161 000
DRIE expenditure 1983-84	\$ 3 764 000

This agreement is aimed at strengthening the community structure of rural areas, improving opportunities for long-term employment related to the development of the region's natural resources, and strengthening and diversifying the economic base of rural and urban areas by encouraging the development of alternative secondary industry.

Four of the five major programs have been completed: phase one, Upper Ottawa Valley; New Forests in Eastern Ontario (hybrid poplar); Kirkland Lake Area Geoscientific Surveys and Mineral Studies; and Elliot Lake Infrastructure. The fifth, the Pembroke Area Infrastructure Program, is well underway.

OTHER PROGRAMS**Industrial and Regional Development Program (IRDP)**

In Ontario a "market-driven industrial development strategy" was implemented which gives particular encouragement to those companies which have identified existing and potential market opportunities, and which need assistance in order to become more competitive and to take advantage of those opportunities. Top priority was placed on those applicants who demonstrated the most willingness and ability to make inroads on foreign competitors, and to those who showed a strong potential for achieving export-market or import-replacement sales.

IRDP was promoted through DRIE-sponsored seminars to explain the programs. These were held in 66 cities, and attended by an estimated total of 2 800 businesspeople.

Activity under IRDP from July, 1983 (when the program was introduced) to March 31, 1984:

Net accepted offers	77
Number of jobs expected to be created	1 776
Eligible capital investment generated (estimate)	\$ 84 591 916
DRIE commitment through these offers	\$ 26 127 037
Total payments 1983-84	\$ 1 438 578

Regional Development Incentives Act (RDIA)

All northern Ontario, plus the Renfrew-Pembroke area in the east, is eligible for assistance under the RDIA.

Activity under RDIA during 1983-84:

Net accepted offers	21
Number of jobs expected to be created	295
Eligible capital investment generated (estimate)	\$ 27 034 220
DRIE commitment through these offers	\$ 5 872 476
Total payments 1983-84	\$ 1 046 707

This program will end on December 31, 1984.

Business and Industrial Development Program (BIDP)

This program, which falls under the Canadian Industrial Renewal Board (CIRB), is designed to strengthen and diversify the industrial base of regions that have traditionally depended on the textile, clothing or footwear industries. Two areas -- Cornwall and Hawkesbury -- are the only ones outside the province of Quebec that have been designated under the program.

Activity under BIDP during 1983-84:

Net accepted offers	15
Number of jobs expected to be created	291
Eligible capital investment generated (estimate)	\$ 7 218 500
DRIE commitment through these offers	\$ 2 766 255
Total payments 1983-84	\$ 834 130

MANITOBA

In 1983-84, assistance under the Industrial and Regional Development Program was initiated. Funding under the former Regional Development Incentives Program continued to flow.

SUBSIDIARY AGREEMENTS

As of March 31, 1984, three subsidiary agreements were in effect under the GDA. Following is a brief description of activities under subsidiary agreements during 1983-84.

Northern Development Agreement

Duration: 29/11/82 to 31/03/87

Costs shared by:

DRIE	\$ 62 800 000
Employment and Immigration	40 000 000
Indian Affairs and Northern Development	22 200 000
Provincial government	61 200 000
Total estimated cost	\$186 200 000

DRIE expenditure to date	\$ 12 148 913
DRIE expenditure 1983-84	\$ 10 626 208

The objectives of this agreement are to develop locally-based income and employment opportunities in northern and remote communities and to increase the participation of the northern labour force, particularly in major resource sectors, by

removing constraints to human and economic development. The programs within the agreement focus on community economic development, human development and community improvement.

The agreement is designed to put local residents in a position of readiness to take advantage of future economic developments in northern Manitoba. Coordination among parties to the agreement is to facilitate measures of preparation for employment, identification of emerging opportunities and placement of trained workers in a range of resource developments and technical, professional and service jobs.

Winnipeg Core Area Agreement

Duration: 04/09/81 to 31/03/86

Costs shared by:

DRIE	\$ 32 000 000
City of Winnipeg	32 000 000
Provincial government	32 000 000
Total estimated cost	\$ 96 000 000

DRIE expenditure to date	\$ 7 882 571
DRIE expenditure 1983-84	\$ 2 880 366

The Canada-Manitoba-Winnipeg Core Area Agreement responds to the social, economic and neighbourhood conditions in the city's core. This area covers the downtown and surrounding older neighbourhoods of Winnipeg and accounts for one-fifth of the city's population. Historically, the area has played a major role in the development of Manitoba and the West. However, during the past 30 years of rapid suburban growth, its major strengths and opportunities have been overshadowed by social, economic and physical deterioration.

The objectives of the agreement are to provide increased employment opportunities; to encourage appropriate industrial, commercial and residential development and to revitalize the physical and social environment of the core area; and to facilitate the effective social and economic participation of core area residents in development opportunities.

These objectives are being pursued through a comprehensive and integrated set of programs including industrial and commercial development programs; an employment preparation and affirmative action program; and housing, community improvement, community facilities and community services programs designed to revitalize older residential neighbourhoods.

Tourism Development Agreement

Duration: 01/04/79 to 31/03/85

Costs shared by:

DRIE	\$ 12 000 000
Provincial government	8 000 000
Total estimated cost	\$ 20 000 000

DRIE expenditure to date	\$ 4 030 020
DRIE expenditure 1983-84	\$ 2 950 846

The overall objective of this agreement is to strengthen the destination areas in the province and to improve the productivity of the tourism industry through joint industry and government action.

OTHER PROGRAMS

Activity under these programs was as follows:

Industrial and Regional Development Program

Net accepted offers	24
Number of jobs expected to be created	1 509
Eligible capital investment associated with offers	\$ 37 987 339
DRIE commitment through these offers	\$ 9 980 115
Total payments 1983-84	\$ 36 336

Regional Development Incentives Program

Net accepted offers	54
Number of jobs expected to be created	815
Eligible capital investment associated with offers	\$ 29 511 699
DRIE commitment through these offers	\$ 7 019 599
Total payments 1983-84	\$ 6 331 506

Special ARDA

The purpose of the Special ARDA agreement, entered into under the Agricultural and Rural Development Act (ARDA), is to assist in the economic development and social adjustment of residents of rural areas, particularly Native people who previously had little or no access to regular earnings and employment opportunities. Financial assistance is provided to eligible commercial undertakings or primary-producing activities for job creation and income improvement. The agreement has been extended to March 31, 1987.

DRIE Special ARDA expenditures in 1983-84 in Manitoba were \$4,116,652.70.

SASKATCHEWAN

Prior to the conclusion of the General Development Agreement (GDA) on March 31, 1984, a new phase in federal-provincial economic partnership was launched with the signing of a 10-year Economic and Regional Development Agreement (ERDA) on January 30, 1984.

Outlined below is a progress report of DRIE activities under the GDA, ERDA and other funded programs during 1983-84.

SUBSIDIARY AGREEMENTS

Qu'Appelle Valley

Duration: 06/10/75 to 31/03/84

Costs shared by:

DRIE	\$ 7 760 000
Environment Canada	9 000 000
Parks Canada	1 200 000
Provincial government	15 740 000
Total estimated cost	\$ 33 700 000

DRIE expenditure to date	\$ 7 004 000
DRIE expenditure 1983-84	\$ 1 023 000

The Qu'Appelle Valley is a major tourist attraction for Saskatchewan residents and, potentially, for out-of-province tourists.

The agreement has three main objectives: to ensure the long-term productivity of the Qu'Appelle Valley's recreation and tourism resource base; to increase the benefits from utilization of this resource base; and to improve the management of land and water resources. Environment Canada has a major role in the management of land and water resources through programs for river channel improvement, water quality monitoring and the control of flood-prone lands.

Planning

Duration: 01/04/79 to 31/03/84

Costs shared by:

DRIE	\$ 750 000
Provincial government	750 000
Total estimated cost	\$ 1 500 000

DRIE expenditure to date	\$ 564 000
DRIE expenditure 1983-84	\$ 252 000

The prime objectives of this second planning agreement are to identify and analyze economic opportunities; to conduct studies in the areas of urban social adjustment, community planning and mapping, and core redevelopment in Saskatchewan; and to develop strategies, programs and subsidiary agreements pursuant to those opportunities and studies.

OTHER PROGRAMS

Industrial and Regional Development Program (IRDP)

Net accepted offers	8
Number of jobs expected to be created	6
Eligible capital investment associated with offers	\$ 1 075 212
DRIE commitment through these offers	\$ 454 006
Total payments 1983-84	\$ 105 000

Under this program, companies may obtain financial assistance by means of contributions, repayable contributions and participation loan guarantees.

Regional Development Incentives Program (RDIA)

Net accepted offers - fiscal 83/84	15
Number of jobs expected to be created	246
Eligible capital investment associated with offers	\$ 11 309 000
DRIE commitment through these offers	\$ 2 869 000
Total payments 1983-84	\$ 5 546 000

Special ARDA

Net accepted offers	164
Number of jobs expected to be created	325
DRIE commitment through these offers	\$ 5 851 458
Total payments 1983-84	\$ 3 698 000

The Special ARDA program facilitates the economic and social adjustment of residents of rural and remote areas, particularly those of Indian ancestry who previously have had limited opportunities for regular earning and employment.

Enterprise Development Program/Science and Technology Enhancement Program - EDP/STEP

	No.	Amount
Projects approved 83-84	10	\$1 489 262
STEP	2	93 800

1983-84 payments \$1 384 000

The programs were terminated with the introduction of IRDP in July, 1983. The last of the applications on-hand have been processed, so there will be no approvals in fiscal 1984/85.

ALBERTA

As a result of the recession, business demand for DRIE financial assistance in Alberta was weak during 1983-84. A number of projects either did not proceed, or did so at a slower pace and smaller scale than expected.

By March 31, 1984, seven subsidiary agreements under the GDA had been signed with Alberta but only one, the Nutritive Processing Assistance Agreement, remained in effect. The nutritive agreement was due to expire March 31, 1984, but was given a one-year extension to March 31, 1985.

The latter part of 1983-84 saw the first activity in Alberta under the new Industrial and Regional Development Program. Following is a brief description of activities under the current subsidiary agreement and other programs during 1983-84.

SUBSIDIARY AGREEMENT

Nutritive Processing Assistance

Duration: 19/08/81 to 31/03/85

Costs shared by:

DRIE	\$ 14 000 000
Provincial government	14 000 000
Total estimated cost	\$ 28 000 000

DRIE expenditure to date	\$ 2 047 895
DRIE expenditure 1983-84	\$ 949 048

This agreement expands on the earlier nutritive processing assistance agreement which expired on June 30, 1981. Its objectives are to strengthen the economic viability of small rural communities, and encourage the further processing in Alberta of those nutritive products which have, or may achieve, a competitive position in national or export markets through development of new technology. To date 91 offers totalling \$11 million have been accepted by companies in rural Alberta, with the expectation that 475 jobs will be created. Another 141 applications were being evaluated at the end of the year under review.

Projects assisted under this agreement include: meat, dairy and vegetable processing facilities; bakeries; feedmills; and several specialty nutritive processors.

OTHER PROGRAMS

Regional Development Incentives Program

During the year under review, three offers of assistance were made under the Regional Development Incentives Program. Total payments in 1983-84 for offers accepted in previous years amounted to \$690 823.

Industrial and Regional Development Program

During the year under review, 28 offers of assistance were made under the Industrial and Regional Development Program. Total payments in 1983-84 for offers accepted amounted to \$18 275.

BRITISH COLUMBIA

The fiscal year saw the consolidation of programs and administrative operations in the region. Specifically the physical integration of DREE and ITC offices was completed including the relocation of the Victoria District Office.

Consultation continued with FBDB to promote departmental programs and with CEIC on entrepreneurial immigration and employment development programs. Efforts were made to assert the significant role of DRIE in support of trade development in the exporting community and in developing a tourism sector strategy. An evaluation of the Industrial Development Subsidiary Agreement was completed.

As of March 31, 1984, all eleven subsidiary agreements signed under the GDA had expired. Following is a brief description of activities under subsidiary agreements and other programs during 1983-84.

SUBSIDIARY AGREEMENT

Travel Industry Development

Duration: 17/10/78 to 17/10/83

Costs shared by:

DRIE	\$ 25 000 000
Provincial government	25 000 000
Total estimated cost	\$ 50 000 000

DRIE expenditure to date	\$ 22 770 767
DRIE expenditure 1983-84	\$ 2 047 071

The purpose of the agreement was to strengthen the role of the travel industry in the province's economic development.

Programs were designed to develop long-term strategies for the travel industry by identifying trends, gaps and future directions, and by conducting feasibility and opportunity studies; to develop the institutional structure needed to co-ordinate travel industry associations; to upgrade travel industry facilities and infrastructure; to support creation, improvement or expansion of major travel generators such as cultural centres, special interest parks, historic sites and developed natural attractions; and to aid development of world-class ski resorts offering year-round, multi-use recreation facilities.

OTHER PROGRAMS

Industrial and Regional Development Program

Net accepted offers	31
Number of jobs expected to be created	434
Eligible capital investment associated with offers	\$ 16 241 593
DRIE commitment through these offers	\$ 4 187 668

Special Recovery Capital Projects Program

This program provides funds for key facilities and services that will foster expansion by the Canadian private sector as well as reinforce recovery of the economy.

During the fiscal year DRIE contributed \$15 million to the construction of a pulp and paper research facility in Vancouver and \$11 million towards the upgrading of water and sewerage systems in Ucluelet, Tofino and Clayquot Sound on the west coast of Vancouver Island.

Industrial and Labour Adjustment Program

During the fiscal year, Port Alberni was the first community in western Canada to become eligible for special financial aid under ILAP.

The industrial assistance portion of ILAP provided help to manufacturing or processing businesses wishing to expand, restructure or set up operations in the designated area.

The job creation component provided improved training allowances, portable wage subsidy programs, enriched mobility incentives and early retirement benefits.

Regional Development Incentives Program

Activity under the Regional Development Incentives Program during the fiscal year was as follows:

Net accepted offers	5
Number of jobs expected to be created	168
Eligible capital investment associated with offers	\$ 11 878 675
DRIE commitment through these offers	\$ 1 587 836
Total payments 1983-84	\$ 656 151

Special ARDA

This agreement, entered into under the Agriculture and Rural Development Act (ARDA), provides assistance for the establishment, expansion or modernization of commercial undertakings which provide employment for people of native ancestry. Assistance is also available for special training needs for potential native employees and for the community services and facilities required to support development in remote parts of the province. In contrast to other western provinces, British Columbia does not have a northlands subsidiary agreement focused on native people; therefore Special ARDA meets many of these needs for community assistance, especially in the north. DRIE expenditures under Special ARDA in British Columbia totalled \$3.25 million during 1983-84. The program expired March 31, 1984.

YUKON

As of March 31, 1983, all subsidiary agreements under the former General Development Agreement (GDA) had expired. However, payments were made in 1983-84 under previous commitments.

The Canada-Yukon Tourism and Small Business Incentives Program was initiated March 31, 1983, to provide assistance over one year to the tourism industry for development and marketing projects. This program provided direct delivery of a \$2 million federal program in conjunction with a \$200 000 territorial government program through a joint advisory committee.

Following is a brief description of program activities during 1983-84.

Canada-Yukon Tourism and Small Business Incentives Program

Activity under the Canada-Yukon Tourism and Small Business Incentives Program during 1983-84 was as follows:

Net accepted offers	54
Number of jobs expected to be created	212
Eligible capital investment associated with offers	\$ 4 157 976
DRIE commitment through these offers	\$ 2 000 180
Total payments 1983-84	\$ 888 000

The purpose of the interim program is to stimulate the creation and expansion of small business enterprises and other undertakings to strengthen Yukon's travel industry. Programs are designed to develop and upgrade tourist accommodations and services; to stimulate travel into and within Yukon; to aid the development and marketing of new package tours, and to develop new attractions and events.

The program permitted continued programming for development and marketing during the period between the expiration of Canada-Yukon Interim Tourism Subsidiary Agreement (1980-83) and the implementation of the Tourism and Small Business Development Subsidiary Agreement now being negotiated by DRIE under the new Economic and Regional Development Agreement.

Regional Development Incentives Program

Activity under the Regional Development Incentives Program during the fiscal year was as follows:

Net accepted offers		1
Number of jobs expected to be created		8
Eligible capital investment associated with offers	\$	135 000
DRIE commitment through these offers	\$	57 435
Total payments 1983-84	\$	36 000

Industrial and Regional Development Program

Activity under the Industrial and Regional Development Program during the fiscal year was as follows:

Net accepted offers		1
Number of jobs expected to be created		3
Eligible capital investment associated with offers	\$	125 000
DRIE commitment through these offers	\$	47 119
Total payments 1983-84		NII

Special ARDA

The Special ARDA agreement was signed with Yukon in 1978 and expired March 31, 1982. On October 4, 1982, it was extended to March 31, 1984.

The program is intended to meet an important need for small business development, training and employment for Yukon's native people. Assistance was provided to start, expand or modernize commercial ventures employing native people and to help improve incomes from traditional activities such as hunting, trapping, fishing and forestry. Assistance was also provided for special training needs of potential native employees.

A preliminary evaluation study has determined that Special ARDA is well received by the native people of Yukon and has created a significant number of jobs and business opportunities that would not have been possible without the program.

During the life of the program, Special ARDA has provided approximately \$3.6 million to fund about 110 projects throughout Yukon. During 1983-84, 31 offers of assistance were accepted and a total of approximately \$1.1 million was committed to a variety of projects. During this period, DRIE expenditures under the program amounted to \$863,000.

NORTHWEST TERRITORIES

The department's programs continued to be heavily utilized throughout the NWT, particularly the Special ARDA program. Emphasis was placed throughout 1983-84 on introduction of the Domestic Market Development programs of the Economic Development Agreement. Tourism development under a variety of department programs continued to be a priority.

Program activities of the department for the period were:

ECONOMIC AND REGIONAL DEVELOPMENT AGREEMENT

Signed by the federal and territorial governments on December 21, 1982, the ERDA provides a co-operative and co-ordinated approach to business, human and natural resource development.

DRIE is the lead federal partner in the Domestic Market Development Sub-Agreement, which terminates March 31, 1986. A total of \$10.75 million is available to: increase business opportunities through financial support to initiatives by new or existing businesses; support tourism associations in development and implementation of marketing programs; develop or improve awareness, facilities, attractions or services for tourism; help communities prepare economic development plans.

OTHER PROGRAMS

Special ARDA

First signed in 1977, the Special ARDA program's first two-year extension ended March 31, 1983, with renewal expected. Up to expiration, 364 projects had been assisted with \$14,931,482 in funding for the creation of 442 new jobs.

Preliminary findings of an evaluation of the program now underway indicate that the program has strong support from native residents of the NWT and has been heavily utilized in all parts of the Territories. The main aim of the program is to assist NWT residents -- particularly those of native ancestry -- to improve their economic well-being through increased involvement in traditional or wage employment.

This aim is being achieved by: providing assistance for the establishment, expansion or modernization of businesses employing a majority of native people; providing assistance for the purchase of equipment to improve resource harvesting capabilities and incomes for hunters, trappers and fishermen; and assisting in social adjustment measures enabling native people to take greater advantage of employment and income-earning opportunities.

**STATEMENT OF EXPENDITURES
FOR THE FISCAL YEAR 1983/84**

INDUSTRY, TRADE AND COMMERCE

Trade - Industrial Program	<u>(\$000)</u>	
Operating and Capital Expenditures	91,794	
Grants and Contributions		
- Grants to assist in the development of personnel in specialized fields or knowledge of importance to Canadian industry	802	
- Payments under the Small Business Investment Grant Act	4,019	
- Enterprise Development Program	166,412	
- Canadian Defence Industry	144,232	
- Construction of fishing vessels	77,437	
- Contributions for industry development	10,208	
- Contributions to selected research and development projects	5,321	
- Construction of Dry Docks	466	
- Capital costs of trade centres	8,071	
- Industrial and Regional Development Program	8,279	
- Liabilities under the Small Business Loans Act	25,449	
- Insurance Payments under the Enterprise Development Program	16,804	
- Youth and Summer Job Corps Program	58	
	<u>467,558</u>	
Loans and Investments (Non-Budgetary)		
- Loans to the Canadian defence industry	534	
- Loans to Canadian industry	4,485	
- Advances to employees on postings abroad	(63)	
- Loans pursuant to the Industrial and Regional Development Act	975	
	<u>5,931</u>	
Program Sub-Total - Budgetary		<u>559,352</u>
Non-Budgetary		<u>5,931</u>
Tourism Program		
Operating and Capital Expenditures	43,080	
Grants and Contributions	18,465	
Program Sub-Total		<u>61,545</u>
<u>REGIONAL ECONOMIC EXPANSION</u>		
Planning and Administration (Operating and Capital Expenditures)	68,205	
Developmental Opportunity Initiatives	204,425	
Industrial Incentives	65,704	
Other Programs	66,420	
		<u>404,754</u>
<u>REGIONAL INDUSTRIAL EXPANSION</u>		
Operating Expenditures		1,895
<u>GRAND TOTAL</u> - Budgetary		<u>1,027,546</u>
Non-Budgetary		<u>5,931</u>

STATEMENT OF REVENUES
FOR THE FISCAL YEAR 1983/84

INDUSTRY, TRADE AND COMMERCE

<u>Return on Investments - Interest on:</u>	(000)
Loans to Federal Business Development Bank	49,57
Loans to Manufacturers of Automotive Products	11
Loans to Enterprise Development Program	24
Loans to Footwear and Tanning Industries Program	6
Loans to Pharmaceutical Industry Development Assistance Program	7
Loans to Programs for Advancement of Industrial Technology	19
Other	7
<u>Refunds of Previous Years' Expenditures</u>	23,34
<u>Adjustment to Prior Years' Payables at Year End (PAYE)</u>	2,95
<u>Other Non-Tax Revenue</u>	2,09

REGIONAL ECONOMIC EXPANSION

<u>Return on Investment - Interest from:</u>	
Atlantic Development Board	55
Atlantic Provinces Power Development Act	12,65
Special Areas and Highways Agreement	23,00
P.E.I. Comprehensive Development Plan	93
N.S. Mainland Investments Limited	17
Newfoundland and Labrador Development Corporation	2,62
Tourist Industry Development Sub-Agreements	19
<u>Services and Service Fees</u>	26
<u>Refunds of Previous Year's Expenditures</u>	7,06
<u>Adjustment to Prior Year's PAYE</u>	6
<u>Other Non-Tax Revenue</u>	1

REGIONAL INDUSTRIAL EXPANSION

Grants and Contributions by Region (\$000)

	<u>INDUSTRY, TRADE AND COMMERCE</u>			
	<u>TRADE-INDUSTRIAL PROGRAM</u>	<u>TOURISM PROGRAM</u>	<u>REGIONAL ECONOMIC EXPANSION</u>	<u>TOTAL</u>
NEWFOUNDLAND	4,568	403	19,998	24,969
NOVA SCOTIA	5,018	290	79,169	84,477
PRINCE EDWARD ISLAND	1,569	4,038	13,644	19,251
NEW BRUNSWICK	15,958	78	29,601	45,637
QUEBEC	181,560	6,888	109,124	297,572
ONTARIO	198,354	5,025	22,406	225,785
MANITOBA	7,078	38	30,795	37,911
SASKATCHEWAN	3,139	163	16,539	19,841
ALBERTA	6,861	14	2,362	9,237
BRITISH COLUMBIA	42,733	161	8,580	51,474
NORTHWEST TERRITORIES	230	61	2,170	2,461
YUKON	53	896	2,161	3,110
OUTSIDE CANADA	<u>437</u>	<u>410</u>	<u>-</u>	<u>847</u>
TOTAL	<u>467,558</u>	<u>18,465</u>	<u>336,549</u>	<u>822,572</u>

APPENDIX

SUBSIDIARY AGREEMENTS ACTIVE DURING 1983/84

AGREEMENT	DURATION	TOTAL ESTIMATED COST (\$)	DRIE SHARE (\$)
NEWFOUNDLAND			
Labrador	03/12/76 to 31/03/84	22,097,000	18,258,300
Tourism Development	01/01/78 to 31/03/84	13,264,600	11,938,140
Rural Development	01/04/78 to 30/09/83	16,802,000	15,122,000
Industrial Development Phase I	11/06/79 to 31/03/84	26,650,000	23,985,000
Community Development for Coastal Labrador	29/05/81 to 31/03/87	38,996,000	33,800,000
Pulp and Paper Mill Modernization	01/06/81 to 31/03/85	33,333,000	30,000,000
Industrial Development Phase II	03/06/83 to 31/03/88	17,800,000	17,800,000
Institute of Fish and Marine Technology	16/05/83 to 31/03/87	42,000,000	27,500,000
NOVA SCOTIA			
Strait of Canso Area Development	31/03/75 to 30/06/84	31,057,500	23,503,400
Halifax Panamax Dry Dock	22/01/80 to 31/03/85	57,600,000	43,900,000
Assistance to Michelin Tires (Canada) Ltd.	07/06/80 to 31/12/90	56,000,000	42,000,000
Modernization of Facilities at the Sydney Steel Corporation	07/04/81 to 30/06/84	96,250,000	77,000,000
Pulp and Paper Modernization	23/05/81 to 31/03/84	21,250,000	17,000,000
Ocean Industry Development	24/07/81 to 24/07/86	35,000,000	22,950,000
NEW BRUNSWICK			
Northeast New Brunswick	23/06/77 to 31/03/85	95,500,000	67,175,000
Pulp and Paper	27/08/80 to 31/03/84	53,750,000	43,000,000
Consolidated-Bathurst Inc.	30/03/82 to 31/03/89	199,500,000	19,600,000
Sulphation Roast Leach Pilot Plant	30/09/83 to 31/03/87	18,750,000	15,000,000

AGREEMENT	DURATION	TOTAL ESTIMATED COST (\$)	DRIE SHARE (\$)
QUEBEC			
Industrial Infrastructure	26/03/75 to 30/04/84	137,670,000	82,602,000
Tourism Development	06/04/78 to 31/03/84	136,000,000	69,600,000
Modernization of the Pulp and Paper Industry	15/05/79 to 31/03/84	240,000,000	135,000,000
Société Inter-Port de Québec	03/07/81 to 31/03/86	9,250,000	5,550,000
ONTARIO			
Single-Industry Resource Communities	18/10/76 to 31/03/84	19,800,000	9,383,630
Community and Rural Resource Development	07/12/77 to 31/03/85	29,523,000	13,828,000
Pulp and Paper Industry Facilities Improvement	15/05/79 to 31/03/84	188,100,000	62,700,000
Eastern Ontario	20/12/79 to 31/03/84	50,350,000	25,175,000
Northern Rural Development	02/03/81 to 31/03/84	18,500,000	9,250,000
MANITOBA			
Tourism Development	15/12/78 to 31/03/85	20,000,000	12,000,000
Winnipeg Core Area	04/09/81 to 31/03/86	96,000,000	32,000,000
Northern Development	29/11/82 to 31/03/87	186,200,000	62,800,000
SASKATCHEWAN			
Qu'Appelle Valley	06/10/75 to 31/03/84	33,700,000	7,760,000
Planning	01/04/79 to 31/03/84	1,500,000	750,000
ALBERTA			
Nutritive Processing Assistance	19/08/81 to 31/03/85	28,000,000	14,000,000

AGREEMENT	DURATION	TOTAL ESTIMATED COST (\$)	DRIE SHARE (\$)
BRITISH COLUMBIA			
Travel Industry Development	17/10/78 to 17/10/83	50,000,000	25,000,000
NORTHWEST TERRITORIES			
Domestic Market Development	16/06/83 to 31/03/86	10,750,000	9,675,000

ENTENTE	DURÉE	COÛT ESTIMATIF TOTAL (en dollars)	PART DU MEIR (en dollars)
COLOMBIE-BRITANNIQUE			
Développement de l'industrie des voyages	du 17/10/78 au 17/10/83	50 000 000	25 000 000
TERRITOIRES DU NORD-OUEST			
Expansion du marché intérieur	du 16/06/83 au 31/03/86	10 750 000	9 675 000

ENTENTE	DURÉE	COUT ESTIMATIF TOTAL (en dollars)	PART DU MEIR (en dollars)
QUÉBEC			
infrastructures industrielles	du 26/03/75 au 30/04/84	137 670 000	82 602 000
éveloppement touristique	du 06/04/78 au 31/03/84	136 000 000	69 600 000
modernisation de l'industrie des pâtes et papiers	du 15/05/79 au 31/03/84	240 000 000	135 000 000
ociété Inter-Port de Québec	du 03/07/81 au 31/03/86	9 250 000	5 550 000
ONTARIO			
localités à industrie unique	du 18/10/76 au 31/03/84	19 800 000	9 383 630
mise en valeur des ressources communautaires et rurales	du 07/12/77 au 31/03/85	29 523 000	13 828 000
amélioration des usines de pâtes et papiers	du 15/05/79 au 31/03/84	188 100 000	62 700 000
st de l'Ontario	du 20/12/79 au 31/03/84	50 350 000	25 175 000
éveloppement rural dans le Nord	du 02/03/81 au 31/03/84	18 500 000	9 250 000
ANITOBA			
éveloppement touristique	du 15/12/78 au 31/03/85	20 000 000	12 000 000
entre ville de Winnipeg	du 04/09/81 au 31/03/86	96 000 000	32 000 000
éveloppement du Nord	du 29/11/82 au 31/03/87	186 200 000	62 800 000
ASKATCHEWAN			
allée de la Qu'Appelle	du 06/10/75 au 31/03/84	33 700 000	7 760 000
lanification	du 01/04/79 au 31/03/84	1 500 000	750 000
-BERTA			
ide au traitement des produits alimentaires	du 19/08/81 au 31/03/85	28 000 000	14 000 000

A N N E X E

ENTENTES AUXILIAIRES EN VIGUEUR EN 1983-1984

ENTENTE	DURÉE	COUT ESTIMATIF TOTAL (en dollars)	PART DU MEIR (en dollars)
TERRE-NEUVE			
Labrador	du 03/12/76 au 31/03/84	22 097 000	18 258 30
Développement touristique	du 01/01/78 au 31/03/84	13 264 600	11 938 14
Développement rural	du 01/04/78 au 30/09/83	16 802 000	15 122 00
Développement industriel, première étape	du 11/06/79 au 31/03/84	26 650 000	23 985 00
Développement communautaire de la région côtière du Labrador	du 29/05/81 au 31/03/87	38 996 000	33 800 00
Modernisation des usines de pâtes et papiers	du 01/06/81 au 31/03/85	33 333 000	30 000 00
Développement industriel, deuxième étape	du 03/06/83 au 31/03/88	17 800 000	17 800 00
Institut des pêches et de la technologie maritime de l'Atlantique	du 16/05/83 au 31/03/87	42 000 000	27 500 00
NOUVELLE-ÉCOSSE			
Développement de la zone du détroit de Canso	du 31/03/75 au 30/06/84	31 057 500	23 503 40
Cale sèche Panamax à Halifax	du 22/01/80 au 31/03/85	57 600 000	43 900 00
Aide à la société de pneus Michelin (Canada) limitée	du 07/06/80 au 31/12/90	56 000 000	42 000 00
Modernisation des installations de la Sydney Steel Corporation	du 07/04/81 au 30/06/84	96 250 000	77 000 00
Modernisation de l'industrie des pâtes et papiers	du 23/05/81 au 31/03/84	21 250 000	17 000 00
Développement de l'industrie océanique	du 24/07/81 au 24/07/86	35 000 000	22 950 00
NOUVEAU-BRUNSWICK			
Nord-est du Nouveau-Brunswick	du 23/06/77 au 31/03/85	95 500 000	67 175 00
Industrie des pâtes et papiers	du 27/08/80 au 31/03/84	53 750 000	43 000 00
Consolidated-Bathurst Inc.	du 30/03/82 au 31/03/89	199 500 000	19 600 00
Usine pilote de grillage-sulfatation-lessivage	du 30/09/83 au 31/03/87	18 750 000	15 000 00

Subventions et contributions, selon la région
(en milliers de dollars)

EXPANSION INDUSTRIELLE RÉGIONALE

INDUSTRIE ET COMMERCE

INDUSTRIE ET COMMERCE	PROGRAMME COMMERCIAL ET INDUSTRIEL		TOURISME		EXPANSION ÉCONOMIQUE RÉGIONALE	
TERRE-NEUVE	4 568	403	19 998	24 969	84 477	19 251
NOUVELLE-ÉCOSSE	5 018	290	79 169	84 477	19 251	45 637
ÎLE-DU-PRINCE-ÉDOUARD	1 569	4 038	13 644	19 251	45 637	297 572
NOUVEAU-BRUNSWICK	15 958	78	29 601	225 785	297 572	225 785
QUÉBEC	181 560	6 888	109 124	225 785	297 572	225 785
ONTARIO	198 354	5 025	22 406	225 785	297 572	225 785
MANITOBA	7 078	38	30 795	37 911	37 911	19 841
SASKATCHEWAN	3 139	163	16 539	19 841	19 841	9 237
ALBERTA	6 861	14	2 362	9 237	9 237	51 474
COLOMBIE-BRITANNIQUE	42 733	161	8 580	51 474	51 474	2 461
TERRITOIRES DU NORD-OUEST	230	61	2 170	2 461	2 461	3 110
YUKON	53	896	2 161	3 110	3 110	847
A L'EXTÉRIEUR DU CANADA	437	410	-	847	847	847
TOTAL	467 558	18 465	336 549	822 572	822 572	822 572

**ÉTAT DES RECETTES
POUR L'EXERCICE FINANCIER 1983-1984**

INDUSTRIE ET COMMERCE

(en milliers
de dollars)

49	57	Prêts à la Banque fédérale de développement
11		Prêts aux fabricants de produits de l'automobile
24		Prêts au programme d'expansion des entreprises
6		Prêts au programme des industries de la chaussure et de la tannerie
19		Prêts au programme d'aide au développement de l'industrie pharmaceutique
7		Prêts aux programmes d'avancement de la technologie industrielle
		Autres

23	34	Remboursement des dépenses des années précédentes
2	95	Rajustement par rapport aux sommes à verser en fin d'exercice pour les années précédentes
		Autres recettes non fiscales

EXPANSION ÉCONOMIQUE RÉGIONALE

		Rendement des investissements - Intérêt provenant de :
55		Office d'expansion économique de la région de l'Atlantique
12	65	Lot sur la mise en valeur de l'énergie dans les provinces de l'Atlantique
23	00	Ententes sur les zones spéciales et les routes
93		Plan d'ensemble de développement de l'I.-P.-É.
17		N.S. Mainland Investments Limited
2	62	Société de développement de Terre-Neuve et du Labrador
19		Ententes auxiliaires sur l'expansion de l'industrie touristique

26		Services et frais de services
7	06	Remboursement des dépenses des années précédentes

6		Rajustement par rapport aux sommes à verser en fin d'exercice pour les années précédentes
		Autres recettes non fiscales

**ÉTAT DES DÉPENSES
POUR L'EXERCICE FINANCIER 1983-1984**

INDUSTRIE ET COMMERCE

(en milliers
de dollars)

91 794

épenses de fonctionnement et immobilisations

programme commercial et industriel

Subventions pour aider au perfectionnement du personnel spécialisé ou à l'enseignement dans les domaines importants de l'industrie canadienne
Prêts en vertu de la Loi sur les prêts aux investissements

4 019

des petites entreprises

Programme d'expansion des entreprises

166 412

Industrie canadienne de la défense

144 232

Construction de bateaux de pêche

77 437

Contributions pour l'expansion des industries

10 208

Contributions à certains projets de recherche et de développement

5 321

Construction de cales sèches

466

Coût en capital des centres de commerce

8 071

Programme de développement industriel et régional

8 279

Obligations en vertu de la Loi sur les prêts aux petites entreprises

25 449

Prêts en vertu de la Loi sur le développement industriel et régional

16 804

Programme de la Compagnie des jeunes travailleurs d'été

58

467 558

Prêts et investissements (crédits non budgétaires)

534

Prêts à l'industrie canadienne de la défense

4 485

Prêts à l'industrie canadienne

(63)

Avances à des employés pour des affectations à l'étranger

975

Prêts en vertu de la Loi sur le développement industriel et régional

5 931

Crédits non budgétaires

Crédits budgétaires

559 352

5 931

programme du tourisme

épenses de fonctionnement et immobilisations

43 080

Subventions et contributions

18 465

Crédits budgétaires

61 545

EXPANSION ÉCONOMIQUE RÉGIONALE

Administration et administration (dépenses de fonctionnement et immobilisations)

68 205

Exploitation des possibilités de développement

204 425

Subventions à l'industrie

65 704

Autres programmes

66 420

TOTAL PARTIEL - EXPANSION INDUSTRIELLE RÉGIONALE

404 754

EXPANSION INDUSTRIELLE RÉGIONALE

épenses de fonctionnement

1 895

TOTAL GÉNÉRAL - Crédits budgétaires

1 027 546

Crédits non budgétaires

5 931

développement des entreprises, le développement des ressources humaines et l'exploitation des ressources naturelles.

Le MEIR est le partenaire fédéral principal de l'entente auxiliaire sur le développement du marché national, laquelle prend fin le 31 mars 1986. Au total, 10,75 millions de dollars sont réservées aux fins suivantes : accroître les possibilités commerciales en subventionnant les initiatives prises par des sociétés nouvelles ou existantes, aider les associations touristiques à élaborer et à mettre en œuvre des programmes de commercialisation, susciter et accroître l'intérêt de la clientèle touristique, établir ou améliorer les installations, les attractions et les services touristiques et, enfin, aider les localités à élaborer des plans de développement économique.

LES AUTRES PROGRAMMES

L'entente spéciale ARDA

Conclue en 1977 et venant à expiration le 31 mars 1981, l'entente a été prorogée de deux ans et pourra it l'être de nouveau. À la date d'expiration, de l'aide financière totalisant 14 931 482 \$ avait été accordée pour la réalisation de 364 projets; l'aide doit donner lieu à la création de 442 nouveaux emplois.

Selon les conclusions préliminaires d'une évaluation du programme en cours, celui-ci serait fortement appuyé par les autochtones visés et largement utilisé dans toutes les parties des territoires du Nord-Ouest. Le but principal du programme est d'aider les habitants des T. N.-O. -- à améliorer leur bien-être économique en les incitant à exercer un métier traditionnel ou à se trouver un emploi rémunéré. Cet objectif est en voie d'être atteint grâce aux moyens suivants : aide à l'établissement, à l'agrandissement ou à la modernisation d'entreprises employant une majorité d'autochtones, aide à l'acquisition d'équipement susceptible d'améliorer les capacités d'exploitation des ressources et d'accroître les revenus des chasseurs, des trappeurs et des pêcheurs, aide à l'adoption de mesures d'adaptation sociale permettant aux autochtones de tirer un meilleur parti des possibilités d'emploi et de revenus.

L'entente est destinée à combler une grave lacune chez les autochtones du Yukon sur les plans du développement commercial, de la formation et de l'emploi. Une aide financière a été octroyée pour le lancement, l'agrandissement ou la modernisation d'entreprises commerciales employant des autochtones et pour le relèvement des revenus tirés d'activités traditionnelles telles que la chasse, le piégeage, la pêche et l'exploitation forestière. L'aide devait également répondre aux besoins spéciaux en formation d'éventuels employés autochtones.

Une étude d'évaluation préliminaire a révélé que l'entente spéciale ARDA est bien reçue chez les autochtones du Yukon et qu'elle a créé un grand nombre d'emplois et de possibilités commerciales qui n'auraient pas vu le jour autrement.

Pendant la durée du programme, environ 3,6 millions de dollars ont été consacrés aux termes de l'entente spéciale ARDA au financement de quelque 110 projets dans l'ensemble du Yukon. En 1983-1984, 31 offres d'aide financière ont été acceptées et une somme totale d'environ 1,1 million de dollars a été consacrée à la réalisation de divers projets. Au cours de cette période, les dépenses du MEIR aux termes du programme se sont élevées à 863 000 \$.

LES TERRITOIRES DU NORD-OUEST

Les programmes du ministère, et particulièrement le programme spécial ARDA, ont continué d'être largement utilisés dans l'ensemble des territoires du Nord-Ouest. En 1983-1984, le ministère a mis l'accent sur le lancement des programmes de développement du marché national découlant de l'entente de développement économique. Le développement du tourisme, favorisé par une série de programmes ministériels, a continué d'être une question prioritaire.

Le ministère a entrepris les activités suivantes au cours de l'année :

L'ENTENTE DE DÉVELOPPEMENT ÉCONOMIQUE ET RÉGIONAL

Conclue entre les gouvernements fédéral et territoriaux le 21 décembre 1982, l'entente de développement économique favorise la coopération et la coordination en ce qui concerne le

d'ascendance autochtone. En outre, l'entente prévoyait une aide à la formation spéciale des employés autochtones éventuels et aux services et installations communautaires nécessaires pour appuyer le développement dans les régions éloignées de la province. Contrairement aux autres provinces de l'Ouest, la Colombie-Britannique n'a pas conclu d'entente sur les terres septentrionales centrée sur les autochtones; l'entente spéciale ARDA répondait donc à un grand nombre de besoins d'aide des communautés, spécialement celles qui sont situées dans le Nord. Les dépenses du MEIR aux termes de l'entente spéciale ARDA en Colombie-Britannique se sont chiffrées à 3,25 millions de dollars en 1983-1984. Le programme a pris fin le 31 mars 1984.

LE YUKON

Au 31 mars 1983, toutes les ententes auxiliaires conclues aux termes de l'ancienne entente-cadre de développement étaient venues à expiration, mais des versements étaient encore effectués en 1983-1984 au titre d'engagements antérieurs.

Le programme de subventions au tourisme et aux petites entreprises créé par le Canada et le Yukon est entré en vigueur le 31 mars 1983. Il a pour objet d'aider pendant un an l'industrie du tourisme dans ses projets de développement et de commercialisation. Par l'intermédiaire d'un comité consultatif mixte, il permet la mise en œuvre directe d'un programme fédéral de 2 millions de dollars et, parallèlement, la prestation d'un programme territorial de 200 000 \$.

Le programme de subventions au tourisme et aux petites entreprises, Canada-Yukon

Au cours de l'exercice financier, ce programme a donné lieu aux activités suivantes :

LES AUTRES PROGRAMMES

Voici une brève description des activités entreprises en 1983-1984 dans le cadre des programmes.

Ce programme provisoire a pour objet de stimuler la création et l'expansion de petites entreprises commerciales et autres afin de renforcer l'industrie touristique du Yukon. Les programmes visent à accroître et à améliorer l'hébergement et les services touristiques, à inciter les habitants du Yukon et les étrangers à visiter cette région, à favoriser la préparation et la commercialisation de nouveaux forfaits et à mettre au point des attractions et des événements nouveaux.

Grâce à ce programme, les activités de développement et de commercialisation ont pu être maintenues entre l'expiration de l'entente auxiliaire Canada-Yukon sur le développement du tourisme (1980-1983) et la mise en œuvre de l'entente auxiliaire sur le tourisme et les petites entreprises que le MEIR est en train de négocier dans le cadre de la nouvelle entente de développement économique et régional.

Le programme de subventions au développement régional

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	1
Prévision du nombre d'emplois créés	8
Investissements au titre de l'actif	135 000 \$
admissible afférents à ces offres	
Engagements du MEIR au chapitre	
de ces offres	57 435 \$
Total des versements en 1983-1984	36 000 \$

Le programme de développement industriel et régional

Pendant l'année à l'étude, le programme de développement industriel et régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	1
Prévision du nombre d'emplois créés	3
Investissements au titre de l'actif	125 000 \$
admissible afférents à ces offres	
Engagements du MEIR au chapitre	
de ces offres	47 119 \$
Total des versements en 1983-1984	Néant

L'entente spéciale ARDA

L'entente spéciale ARDA a été conclue avec le Yukon en 1978 et a pris fin le 31 mars 1982. Le 4 octobre 1982, elle a été prorogée au 31 mars 1984.

MEIR dans l'expansion du commerce des localités exportatrices et dans l'élaboration d'une stratégie à l'intention du secteur du tourisme. Une évaluation de l'entente auxiliaire sur le développement industriel a été achevée.

Au 31 mars 1984, les onze ententes auxiliaires conclues en vertu de l'entente-cadre de développement (ECD) étaient toutes venues à expiration. On trouvera dans les pages suivantes une brève description des activités entreprises dans le cadre de l'entente auxiliaire et des autres programmes en 1983-1984.

L'ENTENTE AUXILIAIRE

Le développement de l'industrie des voyages

Durée : 17 octobre 1978 au 17 octobre 1983

Répartition des coûts :

MEIR	25 000 000 \$
Gouvernement provincial	25 000 000
Cout estimatif total	50 000 000 \$

Dépenses du MEIR à ce jour	22 770 767 \$
Dépenses du MEIR en 1983-1984	2 047 071 \$

Cette entente avait pour objectif de renforcer le rôle joué par l'industrie des voyages dans le développement économique de la province. Les programmes visaient à élaborer des stratégies à long terme pour l'industrie des voyages en déterminant les tendances, les lacunes et les orientations futures et en effectuant des études de faisabilité et de possibilité. Ils visaient également à instaurer la structure institutionnelle nécessaire à la coordination des associations de l'industrie des voyages, à améliorer les installations et l'infrastructure reliées à cette industrie, à appuyer la création, l'amélioration ou le développement des principaux stimulants de voyages tels les centres culturels, les parcs d'intérêt spécial, les sites historiques et les attractions naturelles et, enfin, à appuyer l'aménagement de stations de ski internationales offrant des installations multirécréatives tout au long de l'année.

LES AUTRES PROGRAMMES

Le programme de développement industriel et régional

Nombre net d'offres acceptées	31
Prévision du nombre d'emplois créés	434
Investissements au titre de l'actif admissible afférents à ces offres	16 241 593 \$
Engagements du MEIR au chapitre de ces offres	4 187 668 \$

Les projets spéciaux de relance

Ce programme permet de fournir de l'aide financière aux installations et aux services clés qui favorisent l'expansion du secteur privé canadien et qui accélèrent la reprise de l'économie. Pendant l'exercice financier, le MEIR a consacré 15 millions de dollars à la construction, à l'amélioration des réseaux d'adduction d'eau et d'égout à Ucluelet, Tofino et Clayquot Sound sur la côte ouest de l'île Vancouver.

Le programme d'aide à l'adaptation de l'industrie et de la main-d'œuvre (PMAIM) Au cours de l'année, Port Alberni a été la première localité de l'Ouest canadien à devenir admissible à l'aide financière spéciale offerte en vertu du PMAIM.

Le volet aide industrielle du PMAIM appuie les entrepreneurs de fabrication ou de transformation des établissements dans une localité désignée. Le volet création d'emplois a permis d'offrir des allocations de formation, des subventions salariales transférables, des stimulants accrus pour la mobilité et des prestations de retraite anticipée.

Le programme de subventions au développement régional

Le programme de subventions au développement régional a donné lieu, au cours de l'exercice financier, aux activités suivantes :

Nombre net d'offres acceptées	5
Prévision du nombre d'emplois créés	168
Investissements au titre de l'actif admissible afférents à ces offres	11 878 675 \$
Engagements du MEIR au chapitre de ces offres	1 587 836 \$
Total des versements en 1983-1984	656 151 \$

L'entente spéciale ARDA

Cette entente, conclue en vertu de la Loi sur l'aménagement rural et le développement agricole (ARDA), prévoyait de l'aide à l'établissement, à l'expansion ou à la modernisation d'entreprises commerciales desilueuses d'employer des personnes

Ces programmes ont été abrogés avec l'entrée en vigueur du PDIR en juillet 1983. Toutes les demandes reçues au titre de ces deux programmes ont été traitées, si bien qu'aucune autre ne sera approuvée en 1984-1985.

L'ALBERTA

En raison de la récession, les demandes d'aide financière émanant des entreprises de l'Alberta ont été peu nombreuses en 1983-1984. Certains projets ne sont pas allés de l'avant; ceux qui ont démarré ont progressé à un rythme plus lent que prévu et n'ont pas eu l'envergure attendue.

Au 31 mars 1984, sept ententes auxiliaires avaient été conclues en vertu de l'entente-cadre de développement (ECD) avec l'Alberta, mais seule celle portant sur l'aide au traitement des produits alimentaires était encore en vigueur. Elle devait prendre fin le 31 mars 1984, mais a été prolongée d'un an.

Le nouveau programme de développement industriel et régional a donné naissance à des activités en Alberta à la fin de 1983-1984. On trouvera, dans les pages suivantes, une brève description des activités entreprises dans le cadre de l'entente auxiliaire en vigueur et des autres programmes au cours de 1983-1984.

L'ENTENTE AUXILIAIRE

L'aide au traitement des produits alimentaires

Durée : 19 août 1981 au 30 mars 1985
Répartition des coûts :

MEIR	14 000 000 \$
Gouvernement provincial	14 000 000
Coût estimatif total	28 000 000 \$
Depenses du MEIR à ce jour	2 047 895 \$
Depenses du MEIR en 1983-1984	949 048 \$

Cette entente est la prolongation de la précédente qui a pris fin le 30 juin 1981; elle a pour objectifs de renforcer la viabilité économique des petites agglomérations rurales et d'accroître, en Alberta, la transformation des produits alimentaires qui ont occupé ou qui pourraient occuper une place concurrentielle sur les marchés intérieurs et étrangers, grâce à la mise au point de nouvelles techniques. Jusqu'à présent, 91 offres ont été acceptées par des entreprises des régions rurales de l'Alberta, ce qui

LA COLOMBIE-BRITANNIQUE

Le programme de développement industriel et régional

Au cours de l'année à l'étude, trois offres d'aide ont été faites aux termes du programme de subventions au développement régional. Le total des versements effectués au titre des offres acceptées antérieurement s'est élevé à 690 823 \$ en 1983-1984.

Le programme de subventions au développement régional

LES AUTRES PROGRAMMES

Au nombre des projets subventionnés jusqu'à présent aux termes de cette entente, on compte des installations de préparation de la viande, de produits laitiers et de légumes, des pâtisseries, des usines d'aliments pour animaux et plusieurs entreprises de transformation d'aliments nutritifs spéciaux.

représente des contributions de 11 millions de dollars, lesquelles devraient amener la création de 475 emplois. Le ministère procèdait, à la fin de l'année, à l'évaluation de 141 autres demandes d'aide.

Au cours de l'exercice financier, 28 offres d'aide ont été faites aux termes du programme de développement industriel et régional. Le total des versements effectués au titre des offres acceptées s'est élevé à 18 275 \$ en 1983-1984.

Au cours de l'exercice financier, le bureau régional a procédé à la consolidation des programmes et des activités administratives de la région. Plus précisément, le fusionnement des ministères de l'Expansion économique régionale et de l'Industrie et du Commerce a été réalisé, y compris la réinstallation du bureau de Victoria.

Les consultations se sont poursuivies avec la Banque fédérale de développement (BFD) en vue de promouvoir les programmes du ministère ainsi qu'avec la commission de l'Emploi et de l'Immigration du Canada (CEIC) en ce qui a trait aux programmes concernant l'immigration des entrepreneurs et la création d'emplois. On s'est employé à défendre le rôle important joué par le

Voici le résumé des activités du MEIR entreprises dans le cadre de l'EDC, de l'EDR et des autres programmes subventionnés en 1983-1984.

LES ENTENTES AUXILIAIRES

La vallée de la Qu'Appelle

Durée : 6 octobre 1975 au 31 mars 1984

Répartition des coûts :

MEIR	7 760 000 \$
Environnement Canada	9 000 000
Parcs Canada	1 200 000
Gouvernement provincial	15 740 000
Cout estimatif total	33 700 000 \$
Dépenses du MEIR à ce jour	7 004 000 \$
Dépenses du MEIR en 1983-1984	1 023 000 \$

La vallée de la Qu'Appelle constitue l'une des principales attractions touristiques pour les Saskatchewannais et pour les touristes venant de l'extérieur de la province.

Cette entente comporte trois principaux objectifs : assurer la productivité à long terme des ressources touristiques et récréatives de la vallée de la Qu'Appelle, accroître les avantages qui découlent de l'utilisation de ces ressources et améliorer la gestion des ressources en terre et en eau. Environnement Canada joue un rôle important à ce titre par le biais de programmes d'amélioration de la capacité d'écoulement des rivières, par la surveillance de la qualité de l'eau et par la maîtrise de l'inondation des terres.

La planification

Durée : 1^{er} avril 1979 au 31 mars 1984

Répartition des coûts :

MEIR	750 000 \$
Gouvernement provincial	750 000
Cout estimatif total	1 500 000 \$
Dépenses du MEIR à ce jour	564 000 \$
Dépenses du MEIR en 1983-1984	252 000 \$

Les principaux objectifs de la deuxième entente sur la planification sont les suivants : recenser et analyser les possibilités de développement économique, effectuer des études d'adaptation sociale urbaine, de planification communautaire, de cartographie et de réaménagement des noyaux urbains en Saskatchewan et élaborer les stratégies, les programmes et les ententes auxiliaires découlant de ces possibilités et de ces études.

LES AUTRES PROGRAMMES

Le programme de développement industriel et régional (PIDR)

Nombre net d'offres acceptées 8

Prévision du nombre d'emplois créés 6

Investissements au titre de l'actif admissible afférents à ces offres 1 075 212 \$

Engagements du MEIR au chapitre de ces offres 454 006 \$

Total des versements en 1983-1984 105 000 \$

Ce programme permet aux entreprises d'obtenir de l'aide financière sous forme de contributions remboursables ou non ou de garanties de prêts.

Le programme de subventions au développement régional (PSDR)

Nombre net d'offres acceptées 15

Prévision du nombre d'emplois créés 246

Investissements au titre de l'actif admissible afférents à ces offres 11 309 000 \$

Engagements du MEIR au chapitre de ces offres 2 869 000 \$

Total des versements en 1983-1984 5 546 000 \$

L'entente spéciale ARDA

Nombre net d'offres acceptées 164

Prévision du nombre d'emplois créés 325

Investissements au titre de l'actif admissible afférents à ces offres 5 851 458 \$

Engagements du MEIR au chapitre de ces offres 3 698 000 \$

Total des versements en 1983-1984 \$

L'entente spéciale ARDA vise à favoriser le développement économique et l'adaptation sociale des populations habitant des régions rurales et éloignées, notamment celles d'origine autochtone, qui n'avaient eu jusqu'ici qu'un accès limité à des revenus et à des emplois réguliers.

Le programme d'expansion des entreprises et d'aide à l'accroissement de la productivité au moyen de techniques (PEE/AAPT)

Montant	Nombre
PEE	10
AAPT	2
Projets approuvés en 1983-1984	
Versements en 1983-1984	1 384 000 \$

Le centre ville de Winnipeg

Durée : 4 septembre 1981 au 31 mars 1986

Répartition des coûts :

MEIR	32 000 000 \$
Ville de Winnipeg	32 000 000
Gouvernement provincial	32 000 000
Cout estimatif total	96 000 000 \$
Dépenses du MEIR à ce jour	7 882 571 \$
Dépenses du MEIR en 1983-1984	2 880 366 \$

L'entente tripartite Canada-Manitoba-Winnipeg a pour objet de répondre aux besoins socio-économiques du centre ville de Winnipeg et des quartiers avoisinants. Cette partie englobe le centre ville et les vieux quartiers avoisinants ou habite le cinquième de la population. Ce secteur a joué un rôle important dans le développement historique du Manitoba et de l'Ouest. Cependant, au cours des trente dernières années de croissance suburbaine rapide, ses forces et ses possibilités n'ont pu compenser la détérioration sociale, économique et matérielle.

L'entente vise à accroître les possibilités d'emploi, à favoriser le développement industriel, commercial et résidentiel, à revitaliser matériellement et socialement le centre ville et à faciliter la participation sociale et économique des habitants à l'exploitation des possibilités de développement.

Pour atteindre ces objectifs, des programmes complets et intégrés ont été mis en oeuvre, y compris un programme de développement industriel et commercial, un programme de préparation à l'emploi et d'action positive et des programmes de revitalisation de la communauté, des installations et des services dans les quartiers résidentiels plus vieux.

Le développement du tourisme

Durée : 1^{er} avril 1979 au 31 mars 1985

Répartition des coûts :

MEIR	12 000 000 \$
Gouvernement provincial	8 000 000
Cout estimatif total	20 000 000 \$
Dépenses du MEIR à ce jour	4 030 020 \$
Dépenses du MEIR en 1983-1984	2 950 846 \$

L'objectif global de l'entente consiste à renforcer les destinations touristiques dans la province et à améliorer la productivité de l'industrie touristique par des projets conjoints entre l'industrie et le gouvernement.

LES AUTRES PROGRAMMES

Voici des données sur les activités entreprises au titre de chacun des programmes :

Le programme de développement industriel et régional	
Nombre net d'offres acceptées	24
Nombre d'emplois devant être créés	1 509
Investissements au titre de l'actif	37 987 339 \$
admissible afférents à ces offres	
Engagements du MEIR au titre de ces offres	9 980 115 \$
Total des versements en 1983-1984	36 336 \$
Le programme de subventions au développement régional	
Nombre net d'offres acceptées	54
Nombre d'emplois devant être créés	815
Investissements au titre de l'actif	29 511 699 \$
admissible afférents à ces offres	
Engagements du MEIR au titre de ces offres	7 019 599 \$
Total des versements en 1983-1984	6 331 506 \$

L'ENTENTE SPÉCIALE ARDA

L'entente spéciale ARDA conclue en vertu de la Loi sur l'aménagement rural et le développement agricole (ARDA) a pour objet de contribuer au développement économique et à l'intégration sociale des habitants des régions rurales, en particulier des autochtones qui auparavant ne bénéficiaient pas ou pratiquement pas de possibilités d'emploi et de revenu stable. De l'aide financière a donc été accordée aux entreprises commerciales ou à celles du secteur primaire pour créer des emplois et augmenter les revenus. La date d'expiration de l'entente a été reportée au 31 mars 1987.

En 1983-1984, les dépenses du MEIR au Manitoba dans le cadre de cette entente se sont élevées à 4 116 652 \$.

L A S A S K A T C H E M A N

Avant l'expiration, le 31 mars 1984, de l'entente-cadre de développement (ECD), une nouvelle étape dans les relations fédérales-provinciales a été amorcée avec la signature, le 30 janvier 1984, de l'entente de développement économique et régional (EDER) d'une durée de dix ans.

Voici des données concernant le PDIR pour la période allant de juillet 1983 (mois de lancement du programme) au 31 mars 1984 :

Nombre net d'offres acceptées	77
Nombre d'emplois devant être créés	1 776
Investissements au titre de l'actif	84 591 916 \$
admissible afférents à ces offres	
Engagements du MEIR au chapitre	26 127 037 \$
de ces offres	
Total des versements en 1983-1984	1 438 578 \$

La Loi sur les subventions au développement régional (LSDR)

Toutes les régions du nord de l'Ontario, ainsi que celle de Renfrew-Pembroke dans l'Est, sont admissibles à de l'aide en vertu de la LSDR.

Données sur les activités liées à la LSDR en 1983-1984 :

Nombre net d'offres acceptées	21
Nombre d'emplois devant être créés	295
Investissements au titre de l'actif	27 034 220 \$
admissible afférents à ces offres	
Engagements du MEIR au chapitre	5 872 476 \$
de ces offres	
Total des versements en 1983-1984	1 046 707 \$

Le programme prendra fin le 31 décembre 1984.

Le programme de développement industriel et commercial (PDIC)

Ce programme, qui relève de l'Office canadien pour un renouveau industriel (OCRI), a pour objet de renforcer et de diversifier l'assise industrielle des régions qui ont toujours vécu des industries du textile, du vêtement ou de la chaussure. Les deux seules régions à l'extérieur du Québec qui sont visées par le programme sont Cornwall et Hawkesbury.

Données concernant le programme pour 1983-1984 :

Nombre net d'offres acceptées	15
Nombre d'emplois devant être créés	291
Investissements au titre de l'actif	7 218 500 \$
admissible afférents à ces offres	
Engagements du MEIR au chapitre	2 766 255 \$
de ces offres	
Total des versements en 1983-1984	834 130 \$

LE MANITOBA

En 1983-1984, le programme de développement industriel et régional a été lancé et des subventions ont continué d'être accordées dans le cadre du programme des subventions au développement régional.

LES ENTENTES AUXILIAIRES

Au 31 mars 1984, trois ententes auxiliaires étaient en vigueur en vertu de l'ECD. On trouvera dans les pages suivantes une brève description des activités entreprises dans le cadre des ententes auxiliaires en 1983-1984.

Le développement du Nord

Durée : 29 novembre 1982 au 31 mars 1987

Répartition des coûts :	
MEIR	62 800 000 \$
Emploi et immigration	40 000 000
Affaires indiennes et du Nord	22 200 000
Gouvernement provincial	61 200 000
Coût estimatif total	186 200 000 \$
Dépenses du MEIR à ce jour	12 148 913 \$
Dépenses du MEIR en 1983-1984	10 626 208 \$

Cette entente a pour objet d'exploiter les possibilités locales de revenu et d'emploi dans les agglomérations du Nord et d'accroître la participation de la main-d'œuvre du Nord, en particulier dans les principaux secteurs de ressources, par l'élimination des obstacles au développement humain et économique. Les programmes prévus par l'entente portent sur le développement économique communautaire, l'épanouissement humain et l'aménagement communautaire.

L'entente vise aussi à préparer les résidents locaux à tirer profit des projets futurs de développement économique dans le nord du Manitoba. La coordination des activités des parties à l'entente facilitera la préparation à l'emploi, la détermination des débouchés et le placement de travailleurs qualifiés dans divers postes liés au développement des ressources ainsi que dans les domaines techniques et professionnels, et les services.

9,8 millions de dollars de la part du gouvernement fédéral. Ces projets devraient amener la création de 2 800 emplois.

L'est de l'Ontario (EAO)

Durée : 20 décembre 1979 au 31 mars 1984

Répartition des coûts :

MEIR	25 175 000 \$
Gouvernement provincial	25 175 000
Coût estimatif total	50 350 000 \$

Dépenses du MEIR à ce jour	19 219 284 \$
Dépenses du MEIR en 1983-1984	1 333 200 \$

Cette entente avait pour objet de favoriser la stabilisation, la diversification et l'élargissement de l'assise économique des régions rurales de l'Ontario par des mesures visant à développer l'assise des ressources naturelles et à assurer la viabilité à long terme, ainsi qu'à stimuler les investissements du secteur privé dans la région. De l'aide a été offerte pour la réalisation de projets liés à l'agriculture, aux forêts, aux minéraux et au tourisme et des subventions ont été accordées aux petites entreprises.

Au cours de l'année à l'étude, 26 entreprises ont reçu des gouvernements fédéral et provincial des prêts-subventions d'une valeur totalisant un million de dollars.

Le secteur privé a lui aussi apporté sa contribution en investissant 3 millions de dollars, suscitant ainsi la possibilité de créer 500 emplois à plein temps.

Les travaux de reboisement ont continué de fournir de l'emploi à temps partiel aux résidents locaux pendant l'hiver. La technologie des levés par gradiomètre, transférée du gouvernement au secteur privé, a permis de stimuler l'exploration minière par des levés aériens.

Cette entente, qui devait prendre fin le 31 mars 1984, a été prolongée de six mois au début de 1984 en raison d'un arriéré de requêtes à traiter. Le programme n'a pas reçu de crédits supplémentaires.

La mise en valeur des ressources communautaires et rurales

Durée : 7 décembre 1977 au 31 mars 1985

Répartition des coûts :

MEIR	13 828 000 \$
Gouvernement provincial	15 695 000
Coût estimatif total	29 523 000 \$
Dépenses du MEIR à ce jour	8 161 000 \$
Dépenses du MEIR en 1983-1984	3 764 000 \$

Cette entente a pour objet de renforcer la structure des ressources communautaires dans les régions rurales, d'y accroître les possibilités d'emploi à long terme dans le domaine de l'exploitation des ressources naturelles et de renforcer et diversifier l'assise économique des régions rurales et urbaines par des mesures visant à favoriser l'essor d'autres industries secondaires.

Sur les cinq grands projets lancés, quatre sont terminés : la première phase du projet de la vallée supérieure de l'Outaouais, le projet des nouvelles forêts dans l'est de l'Ontario (peupliers hybrides), le projet des levés géoscientifiques et des études sur les minéraux dans la région de Kirkland Lake, ainsi que le projet d'infrastructure d'Elliot Lake. Quant au cinquième, qui porte sur l'infrastructure de la région de Pembroke, il est en bonne voie de réalisation.

LES AUTRES PROGRAMMES

Le programme de développement industriel et régional (PIDR)

En Ontario, une stratégie de développement industriel axée sur le marché a été mise en oeuvre pour aider tout particulièrement les entreprises qui ont constaté des possibilités d'exploitation de créneaux réels ou éventuels à en tirer profit et à mieux soutenir la concurrence. La priorité a été accordée aux requérants les plus disposés et les plus aptes à s'approprier une part du marché de leurs concurrents ainsi qu'à ceux qui possèdent un potentiel solide sur les plans des ventes à l'exportation ou de la fabrication de produits de remplacement des importations.

Pour faire connaître le programme et en expliquer les modalités de fonctionnement, le MEIR a parainé des colloques dans plus de 66 villes auxquel quelques 2 800 gens d'affaires ont assisté.

spécialisant dans le domaine ont été recrutés dans le cadre du programme d'emplois d'été des jeunes pour aider, depuis différents centres disséminés dans toute la province, les fabricants à mieux vendre leurs produits à l'étranger.

Au cours de 1983-1984, le ministère a dépensé 121,7 millions de dollars en Ontario, dont 97,7 millions ont été distribués sous forme de subventions directes à l'industrie et 15,9 millions ont été affectés à des projets prévus par les ententes auxiliaires entre le gouvernement fédéral et celui de l'Ontario.

LES ENTENTES AUXILIAIRES

Au 31 mars 1984, 12 ententes auxiliaires avaient été signées en vertu de l'entente-cadre de développement (ECD) entre le gouvernement fédéral et celui de l'Ontario, dont six étaient en vigueur pendant la période visée. L'une d'elles, celle du projet d'infrastructure à Sault-Sainte-Marie, était du ressort de Travaux publics Canada, tandis que celle sur l'aménagement des forêts relevait d'Environnement Canada.

Les localités à industrie unique

Durée : 18 octobre 1976 au 31 mars 1984

Répartition des coûts :

MEIR Affaires indiennes et du Nord 314 908

Transports Canada 150 000

Société canadienne d'hypothèques et de logement 366 462

Gouvernement provincial 9 585 000

Dépenses du MEIR à ce jour 9 344 238

Dépenses du MEIR en 1983-1984 800 000 \$

Cette entente visait à diversifier et à stabiliser l'économie des localités à industrie unique du nord de l'Ontario et à lancer des programmes destinés à atténuer les problèmes socio-économiques qui leur sont propres. Elle prévoyait six projets d'infrastructure de grande envergure.

Tous les projets ont été réalisés et, au 31 mars 1984, date d'expiration de l'entente, pratiquement tous les fonds qui s'y rattachaient avaient été dépensés.

La modernisation des installations de l'industrie des pâtes et papiers

Durée : 15 mai 1979 au 31 mars 1984

Répartition des coûts :

MEIR 62 700 000 \$

Gouvernement provincial 125 400 000

Dépenses du MEIR à ce jour 58 184 000 \$

Dépenses du MEIR en 1983-1984 6 575 000 \$

Destinée à stimuler l'investissement du secteur privé dans l'industrie des pâtes et papiers de la province par des mesures incitatives visant la modernisation des usines, l'économie de l'énergie et la lutte contre la pollution, cette entente a suscité des investissements de l'ordre de 1,3 milliard de dollars de la part de l'industrie.

La contribution de 60 millions de dollars du MEIR a joué un rôle crucial dans le succès de l'entente qui a pris fin le 31 mars 1984.

Le développement rural du Nord (DRN)

Durée : 2 mars 1981 au 31 mars 1984

Répartition des coûts :

MEIR Affaires indiennes et du Nord 750 000

Gouvernement provincial 8 500 000

Dépenses du MEIR à ce jour 4 530 000 \$

Dépenses du MEIR en 1983-1984 2 373 000 \$

Cette entente avait pour objet d'élargir et de diversifier l'assise économique dans les régions rurales du nord de l'Ontario par des stimulations offertes aux entreprises de petite envergure et par une aide financière permettant la réalisation d'un large éventail d'activités économiques dans les domaines de l'agriculture, des ressources naturelles, du tourisme et du développement des petites entreprises.

L'entente prévoyait en outre l'affectation de 1,5 million de dollars à des projets concernant les autochtones. La réalisation à frais partagés de ces projets relevait du ministère des Affaires indiennes et du MEIR.

En mars 1984, 547 projets avaient été approuvés, ce qui représente un engagement d'environ

Le programme de stimulants industriels a donné lieu, au cours de l'exercice financier 1983-1984, aux activités suivantes :

Nombre net d'offres acceptées	6
Prévision du nombre d'emplois créés	59
Investissements au titre de l'actif admissible se rapportant	
à ces offres	1 259 000 \$
Engagements du MEER au chapitre de ces offres	629 000 \$
Total des versements en 1983-1984	241 000 \$

Le programme de développement industriel et régional	
Nombre net d'offres autorisées	106
Prévision du nombre d'emplois créés	2 808
Coût total des projets	56 713 000 \$
Engagements du MEIR au chapitre de ces offres	15 372 000 \$
Total des versements en 1983-1984	138 000 \$

Le programme vise à doter le Québec d'un réseau minimal de ports de refuge sur le Saint-Laurent permettant, d'une part, d'accroître l'infrastructure d'accueil lors des événements Québec 1954-1984 et, d'autre part, d'être en mesure à plus long terme d'attirer sur le Saint-Laurent un plus grand nombre de plaisanciers canadiens et américains.

Ce programme est entrepris en collaboration avec le ministère des Travaux publics et Pêches et Océans Canada. Il vise la création de six nouveaux ports permettant une augmentation de 500 à 600 places destinées aux plaisanciers et la réfection de cinq autres havres.

- Les ports suivants ont fait ou feront l'objet d'une contribution dans le cadre de ce programme :
- Baie-ComEAU
 - Cap-a-l'Aigle
 - Gaspé
 - Ile-aux-Coudres
 - Lévis
 - Neuville
 - Sept-Îles
 - Sillery
 - Saint-Laurent-Ile d'Orléans
 - Tadoussac
 - Berthier.

Il est à noter que certains travaux ont été réalisés dans le cadre du programme fédéral de stimulation immédiate de l'emploi.

Le programme de développement touristique pour l'est du Québec

Ce programme s'inscrit dans le cadre du plan fédéral Canada-Bas Saint-Laurent-Gaspésie, annoncé le 5 mai 1983, visant à améliorer les perspectives de développement économique de l'est du Québec. Le programme vise à :

- favoriser le développement, la modernisation et la consolidation des infrastructures d'hébergement de cette région;
 - développer les attraits touristiques susceptibles d'attirer ou de retenir la clientèle touristique, encourager la création de voyages à forfait et promouvoir des événements touristiques d'importance.
- Le ministère devrait injecter plus de 14 millions de dollars dans la mise en œuvre de ce programme au cours des cinq prochaines années.

L'ONTARIO

La création du programme de développement industriel et régional (PIDR) a été de 1983 à nécessité la modification des méthodes de dotation et d'autres procédures, la dissolution de plusieurs programmes remplacés par le PIDR et la prestation d'une aide directe à l'industrie pour des projets axés surtout sur la modernisation et l'innovation.

Pour rejoindre davantage les entreprises admissibles d'une des régions industrielles les plus importantes du Canada et leur offrir de meilleurs services, le MEIR a ouvert, à la fin de 1983, un troisième bureau local dans cette province, plus précisément à London, dans le Sud-Ouest. Les deux autres sont situés à Thunder Bay et à Sudbury.

Aux fins du Mois des exportations canadiennes organisé pour la première fois en octobre dernier et qui deviendra un événement annuel, le MEIR a tenu des colloques sur les exportations dans toutes les régions de l'Ontario et a délégué des représentants à diverses réunions et conférences. Pendant l'été, dix étudiants universitaires se

Le marché mondial de l'investissement. Cette décision favorisera de plus une réaffectation et une utilisation plus complète des fonds alloués.

Au cours de ses trois années d'activités, la SIP s'est fait remarquer, entre autres, par son travail auprès des organismes de développement industriel du Québec métropolitain, la mise sur pied d'une équipe de promotion, principalement chargée de consortiums d'exportation et l'acquisition de terrains pour l'industrie.

L'intervention de la SIP au sein du milieu économique de l'agglomération de Québec aura permis en 1983-1984 d'appuyer, grâce à l'injection de 400 000 \$ de capital de risque, la croissance et le développement d'une entreprise de pointe dans la région, dont les produits de haute technologie offrent un potentiel d'exportation à l'échelle mondiale.

Il convient plus particulièrement de mentionner son engagement au sein du groupe d'action pour l'avancement technologique et industriel de la région de Québec (GATIQ). Ce groupe s'est engagé notamment à promouvoir la mise sur pied d'un institut de recherche en optique et en laser dans la région métropolitaine de Québec.

LES PROGRAMMES DE SUBVENTIONS AU DÉVELOPPEMENT RÉGIONAL

La Loi sur les subventions au développement régional

Au cours de l'exercice financier 1983-1984, la Loi sur les subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	168
Prévision du nombre d'emplois créés	2 220
Investissements au titre de l'actif admissible se rapportant à ces offres	91 652 000 \$
Engagements du MEIR au chapitre de ces offres	19 769 000 \$
Total des versements en 1983-1984	29 146 000 \$

La zone spéciale de Montréal

Ce programme a pour but d'accélérer le développement de la structure industrielle du Québec en renforçant le rôle de la région montréalaise en tant que centre de l'expansion manufacturière de la province.

LES AUTRES PROGRAMMES

Le programme de développement économique des Îles-de-la-Madeleine

En comparaison avec les autres régions du Québec, les Îles-de-la-Madeleine n'ont pas atteint un niveau de développement économique permettant de réduire le chômage chronique qui y sévit. La faible croissance de la croissance économique est en partie attribuable à la situation géographique de cette région. Conscient de ce problème, l'ancien ministre de l'Expansion économique régionale, a mis en œuvre un programme qui vise essentiellement l'amélioration des conditions de vie de la population des Îles, ainsi que la création et le maintien d'emplois permanents en vue de réduire le taux de chômage et l'exode de la population.

Le programme initial représentait un engagement de 13,7 millions de dollars auquel s'est ajouté, au cours de l'exercice financier 1982-1983, une somme de 5,6 millions. Le programme est divisé en sept volets dont trois sont laissés à la maîtrise d'œuvre des ministères des Pêches et des Océans, des Transports et de l'Agriculture. Les quatre autres volets tombent sous la responsabilité du MEIR et prévoient de l'aide financière à des entreprises manufacturières ou touristiques, à des initiatives de développement économique et à des études économiques.

Nombre net d'offres acceptées	79
Prévision du nombre d'emplois créés	2 407
Investissements au titre de l'actif admissible se rapportant à ces offres	108 951 000 \$
Engagements du MEIR au chapitre de ces offres	18 839 000 \$
Total des versements en 1983-1984	34 869 000 \$

Au cours de l'exercice financier 1983-1984, les dépenses du MEIR au Québec, en vertu des programmes de subventions au développement régional, se sont élevées à 64 millions de dollars, dont 34,9 millions ont été versés dans le cadre du programme de la zone spéciale de Montréal.

Le développement touristique

Durée : 6 avril 1978 au 31 mars 1984

MEIR	69 600 000 \$
Gouvernement provincial	66 400 000
Cout estimatif total	136 000 000 \$
Dépenses du MEIR à ce jour	50 613 000 \$
Dépenses du MEIR en 1983-1984	9 688 000 \$

Les objectifs généraux de cette entente portent sur l'accroissement et la diversification des attractions touristiques en vue d'accroître le nombre de touristes étrangers et d'inciter les Québécois à utiliser davantage les installations touristiques de leur province. Les programmes d'aménagement de parcs touristiques, de restauration de bâtiments et de sites historiques, de modernisation de musées, d'aménagement de centres de plein air et de camps de vacances se sont poursuivis.

Au cours de l'année, les gouvernements ont réaffecté les soldes disponibles de l'entente à des projets pouvant être amorcés ou accélérés durant l'année financière. Parmi ces projets, on retrouve :

- la vieille pulperie de Chicoutimi,
- le centre aquatique de Roberval,
- le centre de ski du Mont-Valin.

La modernisation de l'industrie des pâtes et papiers

Durée : 15 mai 1979 au 31 mars 1984

MEIR	135 000 000 \$
Gouvernement provincial	105 000 000
Cout estimatif total	240 000 000 \$
Dépenses du MEIR à ce jour	64 095 000 \$
Dépenses du MEIR en 1983-1984	25 835 000 \$

L'industrie des pâtes et papiers représente le secteur le plus important de l'industrie forestière québécoise. Toutefois, depuis quelques années, l'industrie fait face à un déclin de sa capacité concurrentielle dans le contexte de ses marchés domestique et extérieur.

Grâce à cette entente, les deux gouvernements ont permis à l'industrie des pâtes et papiers de moderniser ses usines et d'en améliorer de ce fait leur compétitivité. Dans le but d'inciter les entreprises à investir davantage, une aide financière leur est accordée sous forme de

La Société Inter-Port du Québec

Durée : 3 juillet 1981 au 31 mars 1986

Répartition des coûts :	5 550 000 \$
MEIR	3 700 000
Gouvernement provincial	9 250 000 \$
Cout estimatif total	2 419 000 \$
Dépenses du MEIR à ce jour	2 419 000 \$
Dépenses du MEIR en 1983-1984	917 000 \$

En 1983-1984, le budget de l'entente, soit 240 millions de dollars, a été dressé de manière à accorder des subventions à 23 entreprises au Québec et à 39 usines. Parmi les entreprises et les usines ainsi touchées, on note la Domtar à Donnacona, la Donohue à Clermont, la Reed à Limoulin, la James McLaren à Masson, la Papir Q.N.S. à Bate-Combeau. De plus, plusieurs usines des sociétés C.I.P., Abitibi-Price et Consolidated-Bathurst ont bénéficié de subventions dans le cadre de cette entente.

subventions directes pouvant atteindre jusqu'à 25 % de l'actif admissible. Les subventions autorisées se rapportent principalement à des projets visant à réduire les coûts de production, à augmenter la valeur ajoutée des produits finis et à favoriser la protection de l'environnement.

Les objectifs poursuivis par la SIP consistent essentiellement à diversifier et à renforcer la structure économique de l'agglomération de Québec et à favoriser la création d'emplois. Elle appuie le secteur privé et stimule l'investissement ayant un impact sur l'économie régionale.

Au cours de 1983-1984, l'entente auxiliaire Canada-Québec sur la Société Inter-Port de Québec, qui devait prendre fin le 31 mars 1984, a vu sa durée prolongée de deux ans en vertu de l'amendement n° 2, en date du 30 mars 1984.

La prolongation permettra à la SIP de continuer ses efforts de prospection industrielle afin de permettre à la région de Québec d'avoir accès au

En vertu du programme des projets de promotion, le service a aidé plus de 200 entreprises du Nouveau-Brunswick à participer à des foires commerciales, à des missions à destination et en provenance de l'étranger, ainsi qu'à des activités de promotion. Plusieurs entreprises ont participé à plus d'une activité.

Le ministère a noué d'étroites relations de travail avec l'industrie en vue de trouver des marchés pour leurs produits, de résoudre les obstacles et les problèmes liés à l'exportation et de les conseiller dans ce domaine. De plus, le ministère a continué de chercher des fournisseurs canadiens de produits et de services pour d'autres pays qui en ont fait la demande par l'entremise de ses conseillers et des ambassades à l'étranger. Plus de 250 contacts personnels ont été établis chaque mois dans le cadre de ces activités.

LE QUÉBEC

L'année 1983-1984 fut marquée par la création du ministère de l'Expansion Industrielle régionale et par la mise en œuvre du programme de développement Industriel et régional (PDIR).

En ce qui a trait aux dépenses du MEIR au Québec en 1983-1984, elles se sont élevées à plus de 297 millions de dollars. Ces dépenses ont été effectuées dans le cadre des divers programmes anciennement sous la responsabilité du MEER et du MIO. De ce montant, 44 millions de dollars ont été déboursés au chapitre des ententes fédérales-provinciales alors que le solde de 253 millions de dollars a été versé, dans le cadre des différents programmes d'aide à l'industrie, sous forme de contributions et de subventions. Les dépenses enregistrées dans le cadre de l'entente sur la modernisation de l'industrie des pâtes et papiers se sont élevées à 26 millions de dollars. Cette somme représente le débours le plus important effectué dans le cadre de cette entente depuis son annonce en 1979.

Dans le cadre du programme PPIMD, deux projets majeurs ont été mis de l'avant en 1983-1984. Il s'agit en premier lieu de l'implantation au Québec d'une usine de fabrication d'hélicoptères bimoteurs légers de la société Bell Helicopter

LES ENTENTES AUXILIAIRES

Les infrastructures industrielles

Durée : 26 mars 1975 au 30 avril 1984
Répartition des coûts :

MEIR	82 602 000 \$
Gouvernement provincial	55 068 000
Coût estimatif total	137 670 000 \$
Dépenses du MEIR à ce jour	60 482 000 \$
Dépenses du MEIR en 1983-1984	7 868 000 \$

La présente entente consiste en un programme d'aide financière destiné aux municipalités désireuses d'améliorer ou d'entretenir leur infrastructure industrielle. Cette aide a favorisé la création et l'expansion de zones industrielles, ainsi que l'établissement de parcs bien équipés dans le domaine de la pêche industrielle en Gaspésie et sur la Côte-Nord. Les municipalités qui ne disposent pas de l'infrastructure nécessaire à l'implantation d'une entreprise industrielle ont pu aussi bénéficier d'une aide aux termes de l'entente.

L'entente étant maintenant terminée, la totalité des fonds qui y étaient alloués ont été engagés dans des projets précis dont plusieurs sont encore en voie de réalisation.

Cette entente a été conçue afin d'atténuer les obstacles au traitement des métaux communs afin d'accroître la rentabilité et les possibilités des installations minières existantes au Nouveau-Brunswick, grâce à la construction d'une usine pilote, ayant une capacité de production de 10 tonnes par jour, ou sera mise à l'essai la technique d'extraction électrolytique et de sulfatation-grillage-lestage permettant d'améliorer la récupération des métaux communs. Les fonds ont été versés en vertu du programme des projets spéciaux de relance mis en vigueur en mai 1983.

Au cours de l'année à l'étude, un immeuble industriel vacant a été acheté dans la région de Chatham et des travaux de rénovation ont été entrepris. De plus, les travaux de conception technique ont été réalisés à forfait et des pièces de gros équipement ont été achetées.

LES AUTRES PROGRAMMES

L'initiative de développement du sud-est du Nouveau-Brunswick

Durée : 25 août 1981 au 31 mars 1986

Chaque ministère participant a présenté une demande de financement distincte au Conseil du Trésor qui a approuvé l'affectation de fonds pour la période allant de 1981-1982 à 1985-1986; ces fonds se répartissent comme suit :

MEIR	3 700 000 \$
Agriculture	3 600 000 \$
Pêches et Océans	2 700 000 \$
Total	10 000 000 \$

Dépenses du MEIR à ce jour 71 000 \$
Dépenses du MEIR en 1983-1984 71 000 \$

La participation du MEIR comprend une subvention de 1,2 million de dollars pour l'exploitation du Bureau de développement du sud-est du Nouveau-Brunswick établi récemment à Cocagne et une affectation de 2,5 millions de dollars pour la mise en œuvre de deux programmes d'aide financière.

Le programme de développement industriel vise à accroître la productivité et les débouchés possibles pour les entrepreneurs locaux. Le programme de développement touristique contribue à l'accroissement des revenus et des emplois dans le secteur du tourisme par l'appui accordé aux attractions touristiques, aux restaurants et aux installations connexes.

La participation du MEIR a débuté en octobre 1983. Au cours de la seconde moitié de 1983-1984, le ministère a offert 117 000 \$ pour favoriser la réalisation de 11 projets industriels dont l'ensemble des coûts s'élèvera à 224 000 \$. La contribution totale pour l'année à l'étude s'est chiffrée à 22 600 \$.

Dans le cadre du programme de développement touristique, 20 offres totalisant 363 000 \$ ont été faites au titre de projets dont le coût total s'élève à 887 000 \$. En 1983-1984, la contribution du ministère s'est élevée à 48 400 \$.

Le tourisme

A l'issue de la réorganisation du MEIR, le ministère a établi, en 1983-1984, un service du tourisme dans la région du Nouveau-Brunswick.

Le service a entrepris la planification stratégique du tourisme dans les régions afin de déterminer les possibilités ainsi que les obstacles sectoriels qui pourraient faire l'objet d'un projet de programme. Les activités de planification pourraient donner lieu à une initiative touristique au cours de l'année prochaine.

Le service du tourisme a participé à des études dans les régions et les sous-régions en vue d'élaborer des plans touristiques comme le plan conceptuel touristique de McAdam; de déterminer les débouchés vers lesquels orienter les programmes comme l'étude sur le développement touristique du sud-est du Nouveau-Brunswick; d'évaluer la faisabilité de projets et de fournir des analyses conceptuelles portant sur des propositions comme celle du pays de la Sagouine.

Le commerce

Le service du commerce a contribué au développement économique et régional et à la création d'emplois en aidant les entreprises du Nouveau-Brunswick à exploiter de nouveaux débouchés en matière d'exportation. Les exportations provinciales ont augmenté de 14 % en 1983, passant de 1,46 milliard de dollars en 1982 à 1,67 milliard en 1983.

Le recours au programme de développement des marchés d'exportation s'est accru; en effet, 54 projets ont été approuvés, soit 86 % de plus qu'en 1982-1983, et un montant total de 210 000 \$ a été accordé, ce qui constitue une hausse de 126 % par rapport à l'année précédente.

Les pâtes et papiers

Durée : 27 août 1980 au 31 mars 1984

Répartition des coûts :

MEIR	43 000 000 \$
Gouvernement provincial	10 750 000
Cout estimatif total	53 750 000 \$

Dépenses du MEIR à ce jour	28 862 900 \$
Dépenses du MEIR en 1983-1984	5 121 950 \$

Sept des usines de la province ont reçu des offres d'aide en vertu de cette entente. D'après les dépenses prévues jusqu'à la fin de mars 1986, lesquelles dépassent 500 millions de dollars, les subventions totales seront 53,25 millions de dollars (dont 42,6 millions seront versés par le gouvernement fédéral).

L'usine de pâtes Boisé Cascade Canada ltée, de Newcastle, recevra une subvention de 4 millions de dollars aux fins de modernisation. Cette société investira 41 millions pour l'amélioration de son matériel dans les domaines de la modernisation des procédés, de la lutte contre la pollution et de l'économie de l'énergie.

La NBIP Limited a obtenu une subvention de 12,5 millions de dollars pour la modernisation de son usine de papier Journal à Dalhousie. Ce projet de modernisation coûtera au total 160,4 millions de dollars.

La St. Anne Nackawic Pulp and Paper Ltd. recevra une subvention de 5 millions de dollars pour la modernisation de son usine de pâtes dans le cadre d'un projet de 62,2 millions de dollars.

Dix-sept millions de dollars seront octroyés à la Fraser Incorporated d'Edmundston pour la modernisation de son usine d'Atholville. Le programme à trois volets coûtera 169 millions de dollars et comprendra la modernisation du matériel, la lutte contre la pollution et l'économie de l'énergie.

Une subvention de 2,5 millions de dollars sera versée à la Lake Utopia Paper Ltd. pour la modernisation de son usine située près de Saint-George. Ce programme de 17 millions de dollars vise la réduction des coûts, l'économie de l'énergie et l'amélioration des installations de lutte contre la pollution.

L'Living Pulp & Paper Ltd. recevra une subvention de 6,75 millions de dollars pour la modernisation de son usine de pâtes kraft à Saint-Jean, programme dont le coût total s'élève à 70 millions de dollars. De grands travaux d'amélioration ont

été entrepris dans le domaine de la supervision des procédés, de l'économie de l'énergie et de la lutte contre la pollution.

Une subvention de 5,5 millions de dollars sera accordée à la Rothesay Paper Ltd. pour la modernisation de son usine de papier Journal de Saint-Jean. Ce programme de 34 millions de dollars sera axé sur l'amélioration de la qualité et la réduction des coûts.

La modernisation de l'usine de la Consolidated-Bathurst Inc., à Bathurst, au Nouveau-Brunswick

Durée : 30 mars 1982 au 31 mars 1989

Répartition des coûts :

MEIR	19 600 000 \$
Consolidated-Bathurst	175 000 000
Gouvernement provincial	4 900 000
Cout estimatif total	199 500 000 \$

Dépenses du MEIR à ce jour	11 760 000 \$
Dépenses du MEIR en 1983-1984	1 865 950 \$

Cette entente servira de catalyseur pour l'investissement de 175 millions de dollars de la Consolidated-Bathurst Inc. aux fins de modernisation. En vertu du programme de modernisation, l'atelier de pâtes kraft de l'usine de Bathurst a fermé ses portes. A sa place, la société a construit, au coût de 100 millions de dollars, une usine de pâtes thermomécaniques ayant une capacité de production de 400 tonnes par jour. L'usine a commencé ses activités de production vers la fin de 1983.

De 1981 à 1987, la société consacrera 7 millions de dollars à la réfection de l'usine de fabrication de carton à onduier. Elle affectera également 60 millions de dollars à l'acquisition d'une nouvelle machine à onduier qui sera mise en exploitation en 1988.

Il en coûtera 10 millions de dollars pour rendre l'usine tout entière conforme aux normes environnementales fédérales-provinciales.

L'usine pilote de sulfatation-grillage-lessivage

Durée : 30 septembre 1983 au 31 mars 1987

Répartition des coûts :

MEIR	15 000 000 \$
Gouvernement provincial	3 750 000
Cout estimatif total	18 750 000 \$

Dépenses du MEIR à ce jour	1 500 000 \$
Dépenses du MEIR en 1983-1984	1 500 000 \$

LES AUTRES PROGRAMMES

Le programme de subventions au développement régional

Au cours de l'exercice financier, le programme de subventions au développement régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	21
Prévision du nombre d'emplois créés	346
Investissements au titre de l'actif	8 302 382 \$
admissible affectés à ces offres	
Engagements du MEIR au chapitre	
de ces offres	3 171 686 \$
Total des versements en 1983-1984	7 203 963 \$

Le programme de développement industriel et régional

Depuis son entrée en vigueur en juillet 1983 jusqu'à la fin de l'exercice financier, le programme de développement industriel et régional a donné lieu aux activités suivantes :

Nombre net d'offres acceptées	19
Prévision du nombre d'emplois créés	351
Investissements au titre de l'actif	8 544 234 \$
admissible affectés à ces offres	
Engagements du MEIR au chapitre	
de ces offres	2 386 071 \$
Total des versements en 1983-1984	59 888 \$

Le programme de développement des marchés d'exportation

Au cours de l'exercice financier, le programme de développement des marchés d'exportation a donné lieu aux activités suivantes :

Demandes approuvées	103
Engagements du MEIR	532 205 \$

LE NOUVEAU-BRUNSWICK

Au cours de 1983-1984, la région du Nouveau-Brunswick s'est adaptée progressivement à la série de changements qui se sont produits à la suite de la création du nouveau ministère. Outre un nouveau mandat, un nouveau programme de développement industriel et régional et une nouvelle structure organisationnelle, ces changements comprennent le déménagement du bureau régional de l'Atlantique ainsi que le déménagement du bureau provincial de Fredericton à Moncton.

LES ENTENTES AUXILIAIRES

Le nord-est du Nouveau-Brunswick

Durée : 23 juin 1977 au 31 mars 1985
Répartition des coûts :

MEIR	67 175 000 \$
Gouvernement provincial	28 325 000
Coût estimatif total	95 500 000 \$
Dépenses du MEIR à ce jour	52 410 000 \$
Dépenses du MEIR en 1983-1984	6 523 169 \$

Cette entente a pour but d'accroître la prospérité à long terme et le niveau de vie de la population de la région en ayant davantage recours aux programmes qui favorisent l'utilisation des ressources humaines et matérielles et qui permettent d'accélérer le développement.

Au cours de l'exercice, le gouvernement provincial et le MEIR ont tenu des discussions pour déterminer les activités à entreprendre, en utilisant le reste des fonds de l'entente auxiliaire sur le nord-est du Nouveau-Brunswick.

Parmi les projets approuvés, mentionnons le projet de CFAO du Collège communautaire de Bathurst (1,6 million de dollars); le Centre des PME (375 000 \$); le traitement des données sur les subventions pour les PME (230 000 \$); le séchoir à bois de Restigouche (240 000 \$); le Centre de recherche sur la tourbe (355 000 \$); le coordonnateur du tourisme (165 000 \$).

Pour permettre la mise en œuvre de ces projets, l'entente a été prolongée d'un an; elle viendra à expiration le 31 mars 1985.

métaux. La construction de la cale sèche flottante et des infrastructures connexes est terminée.

L'aide à la société de pneus Michelin (Canada) limitée

Durée : 7 juin 1980 au 31 décembre 1990

Répartition des coûts :

MEIR
Gouvernement provincial
Côût estimatif total
42 000 000 \$
14 000 000
56 000 000 \$

Dépenses du MEIR à ce jour 29 000 000 \$

Dépenses du MEIR en 1983-1984 29 000 000 \$

Cette entente, qui appuie les activités de l'entreprise à Granton et à Bridgewater, en Nouvelle-Écosse, permet également à la société d'effectuer des améliorations considérables en vue d'accroître sa productivité, notamment en dotant ses deux premières usines d'installations de conception et de fabrication assises par ordinateurs et d'implanter une nouvelle usine de fabrication de pneus à Waterville.

La modernisation des installations de la Sydney Steel Corporation

Durée : 1^{er} avril 1981 au 30 juin 1984

Répartition des coûts :

MEIR
Gouvernement provincial
Côût estimatif total
77 000 000 \$
19 250 000
96 250 000 \$

Dépenses du MEIR à ce jour 46 830 368 \$

Dépenses du MEIR en 1983-1984 33 009 516 \$

Cette entente a pour objectifs d'aider la province à maintenir les niveaux d'emploi qu'exige le bon fonctionnement de l'usine et d'améliorer la situation financière de la société en mettant sur pied un programme de travaux d'équipement qui rendra l'usine apte à fonctionner efficacement.

La modernisation de l'industrie des pâtes et papiers

Durée : 23 mai 1981 au 31 mars 1984

Répartition des coûts :

MEIR
Gouvernement provincial
Côût estimatif total
17 000 000 \$
4 250 000
21 250 000 \$

Dépenses du MEIR à ce jour 7 772 489 \$

Dépenses du MEIR en 1983-1984 5 264 956 \$

Les subventions accordées en vertu de cette entente ont suscité des investissements de quelque 125 millions de dollars dans les travaux de la modernisation d'usines, de réduction de la pollution et des coûts de l'énergie. Ces investissements ont aidé les usines de la Nouvelle-Écosse à conserver leur position concurrentielle et à respecter les normes actuelles de lutte contre la pollution. L'octroi de stimulants à trois entreprises a été approuvé et la mise en oeuvre s'effectue conformément au calendrier.

Le développement de l'industrie océanique

Durée : 24 juillet 1981 au 24 juillet 1986

Répartition des coûts :

MEIR
Gouvernement provincial
Côût estimatif total
22 950 000 \$
12 050 000
35 000 000 \$

Dépenses du MEIR à ce jour 5 010 958 \$

Dépenses du MEIR en 1983-1984 4 114 235 \$

Cette entente, qui est la première initiative canadienne touchant l'industrie océanique, consiste en deux groupes de programmes financés séparément par les gouvernements fédéral et provincial et mis en oeuvre conjointement en vertu de l'entente-cadre de développement. L'entente a pour but de stimuler la croissance des industries océaniques de fabrication et de services à moyenne et haute technologie et d'appuyer la recherche appliquée et le transfert de la technologie de façon que la Nouvelle-Écosse puisse devenir un véritable "centre d'excellence" dans le secteur de l'industrie océanique.

Le programme fédéral offre de l'aide à l'établissement et à la commercialisation; il appuie les associations commerciales de l'industrie océanique, l'aménagement d'un mail de mise en train des industries océaniques naissantes et le Bureau de développement de l'industrie océanique chargé d'élaborer, de coordonner et de promouvoir les programmes fédéraux. Le programme provincial, pour sa part, offre des stimulants fiscaux au niveau municipal, des subventions à l'aménagement d'un parc consacré à l'industrie océanique et d'un centre d'innovation qui produira instructions et conseils aux industries commerciales.

Grâce aux ententes fédérales-provinciales, on a pu maintenir l'aide visant le développement de l'industrie océanique, ainsi que l'aménagement d'infrastructure dans la zone du détroit de Canso et à la cale sèche Panamax de Halifax.

Les activités de développement industriel ont englobé la formulation de politiques, le repérage de débouchés, la promotion du transfert de technologies à la Nouvelle-Écosse et favorisé l'implantation de coentreprises entre le secteur privé et les établissements de recherche.

À titre d'exemple, citons la collaboration appuyée par le MEIR, d'une institution et d'une industrie, en l'occurrence la Seimac Limited et l'Université Dalhousie, en vue de former une nouvelle entreprise -- la Focal Marine -- afin de trouver des applications maritimes aux fibres optiques.

Le bureau régional de la Nouvelle-Écosse a accordé son appui à l'Advanced Microelectronics Institute, au Canadian Fisheries Institute of Technology, à l'Atlantic Coal Institute et au Centre international de développement des océans. Les agents de développement se sont efforcés en outre de saisir toutes les occasions pouvant mener à la création d'autres instituts de recherche et de développement.

Dans le domaine de la commercialisation, l'expansion du commerce, dont la consécration du Mois d'octobre aux exportations canadiennes, a constitué une priorité. Des efforts ont également été déployés en vue d'étendre la participation locale aux grands projets et aux contrats gouvernementaux.

La recherche et le développement ainsi que les projets nouveaux ont été activement favorisés. Ainsi, la Micronav Limited de Sydney a reçu de l'aide pour mettre au point un nouveau système d'approche et d'atterrissage d'aéronef. Appelé "Système d'atterrissage à hyperfréquences", il a été adopté dans les aéroports du monde entier par les autorités de l'aviation internationale comme l'aide à l'atterrissage de l'avenir.

Au cours de l'exercice, le Bureau de développement de l'industrie océanique s'est trouvé au premier rang de ceux qui se sont efforcés d'implanter en Nouvelle-Écosse un centre d'excellence dans le secteur de l'industrie océanique.

Durant la même période, grâce à l'aide du MEIR, de nombreuses entreprises ont été incitées à s'implanter en Nouvelle-Écosse et certaines, dont la Canadian Diamond Boat, qui fabrique des forêts

LES ENTENTES AUXILIAIRES

À diamant, ont fait bénéficier la province de nouvelles technologies. Un grand nombre d'entreprises de fabrication et de transformation de la Nouvelle-Écosse ont pu accroître leurs activités, grâce à l'appui qu'elles ont reçu du MEIR.

On trouvera, dans les pages suivantes, une description sommaire des activités entreprises en 1983-1984 dans le cadre des ententes auxiliaires et des autres programmes.

Le développement de la zone du détroit de Canso

Durée : 31 mars 1975 au 30 juin 1984	Répartition des coûts :
MEIR	22 503 400 \$
Gouvernement provincial	7 554 100
Cout estimatif total	30 057 500 \$
Dépenses du MEIR à ce jour	21 049 956 \$
Dépenses du MEIR en 1983-1984	668 524 \$

Cette entente a pour objectif de doter la zone du détroit de Canso d'une infrastructure afin de mettre en valeur son port en eaux profondes et d'autres ressources de la région susceptibles de favoriser l'implantation d'industries. À l'heure actuelle, les efforts de développement se concentrent sur l'approvisionnement pour les activités gazières au large des côtes, les services et d'autres retombées de cette industrie, ainsi que sur les perspectives offertes par l'industrie lourde. Des fonds alimentent une agence de promotion et de développement, l'Administration du développement industriel du détroit de Canso.

La cale sèche Panamax de Halifax

Durée : 22 janvier 1980 au 31 mars 1985	Répartition des coûts :
MEIR	43 900 000 \$
Gouvernement provincial	13 700 000
Cout estimatif total	57 600 000 \$
Dépenses du MEIR à ce jour	43 368 764 \$
Dépenses du MEIR en 1983-1984	128 048 \$

Cette entente prévoit une participation conjointe à un programme visant à doter le port de Halifax d'une infrastructure maritime essentielle, particulièrement une cale sèche flottante de type Panamax, un quai de mouillage, des services d'entretien et l'outillage auxiliaire requis pour la réparation des navires et la fabrication des

Les stimulateurs touristiques : programme d'aide financière

Ce programme a pour objet d'aider le secteur privé à accroître la qualité et la quantité des installations et services touristiques de l'Île-du-Prince-Édouard.

L'aide offerte au cours de l'année, dans le cadre du programme, a atteint 1 639 814 \$ et a permis la réalisation de 103 projets.

Le programme de destinations touristiques

Ce programme a pour objet de promouvoir le développement des principales destinations touristiques, en particulier dans l'est et l'ouest de la province.

L'aide offerte au cours de l'année, dans le cadre du programme, a atteint 1 709 125 \$ et a permis la réalisation de deux projets.

Le programme de développement industriel

Ce programme a pour objet d'accroître la productivité et l'efficacité, et par là de stimuler le développement industriel.

L'aide offerte au cours de l'année, dans le cadre du programme, a atteint 298 909 \$ et a permis la réalisation de 26 projets.

LES PROGRAMMES ADOPTÉS EN VERTU DU PLAN D'ENSEMBLE DE DÉVELOPPEMENT

L'agriculture

En 1983 et 1984, les programmes agricoles ont permis le maintien de l'aide offerte aux agriculteurs pour qu'ils agrandissent, modernisent et diversifient leurs installations. De plus, les programmes d'agrandissement ont incité les fermiers à appliquer des techniques commerciales modernes en se servant d'une technologie de pointe.

Les marchés et la mise au point des produits

Ce programme a permis de financer partiellement le Centre d'expansion des marchés qui a pour objet d'aider les industries de fabrication et de transformation à obtenir les services de commercialisation dont elles ont besoin pour mieux soutenir la concurrence. De plus, le centre favorise la vente de nouveaux produits, met au point des méthodes de vente et aide à trouver de nouveaux créneaux pour les produits de l'île.

LA NOUVELLE-ÉCOSSE

Le tourisme

Au cours de l'année, de l'aide financière a été offerte pour développer le secteur du tourisme par la réalisation de projets de commercialisation et de promotion des ventes à frais partagés.

L'électricité et l'énergie

Six projets d'utilisation du bois de combustion sur l'Île-du-Prince-Édouard ont été amorcés. Trois consistent en des projets de conversion des installations aux copeaux de bois et les trois autres en des études concernant des systèmes futurs de conversion.

Un projet de deux ans sur les économies d'énergie en milieu agricole et les sources d'énergie de remplacement a aussi été mené à bonne fin.

Le prolongement du réseau électrique triphasé à des industries isolées s'est poursuivi.

Le lancement et la mise en œuvre du programme de développement industriel et régional (PDIR) ont constitué des activités prioritaires pendant toute l'année. En outre, le bureau régional a collaboré plus étroitement avec la Banque fédérale de développement (BFD). Le Centre d'information aux entreprises ayant été intégré à la BFD, les agents de cette institution ont procédé à l'évaluation du PDIR au bureau du MEIR.

Le maintien des grands programmes de modernisation en cours dans toute la Nouvelle-Écosse a été possible grâce aux ententes fédérales-provinciales touchant l'industrie des pâtes et papiers, les usines de la Sydney Steel Corporation et celles de la société Michelin. Pour accroître la productivité, la société Michelin s'est dotée d'installations de conception et de fabrication assistées par ordinateur. Pour sa part, la Sydney Steel Corporation sera bientôt équipée d'un haut fourneau reconstruit et d'une laminière modernisée. Dans le secteur des pâtes et papiers, 21 millions de dollars ont suscité des investissements privés de quelque 125 millions de dollars et ont permis à l'industrie de conserver sa position concurrentielle.

Nombre net d'offres acceptées	5
Prévision du nombre d'emplois créés	32,5
Investissements admissibles liés à ces offres	2 791 314 \$
Engagements du MEIR au chapitre de ces offres	806 623 \$
Total des versements en 1982-1983	1 889 616 \$

Le programme de développement des pêches canadiennes, au Labrador

Durée : 1 ^{er} avril 1981 au 31 mars 1987	
Coût estimatif total	13 500 000 \$
Dépenses du MEIR à ce jour	5 542 000 \$
Dépenses du MEIR en 1983-1984	1 202 000 \$

Le programme vise à accroître l'efficacité des activités de capture, de débarquement, de manutention et d'entreposage du poisson. À ce jour, deux machines à glace, deux entrepôts pour les appâts et le poisson et huit systèmes de débarquement du poisson ont été installés.

En outre, des usines de conditionnement du poisson à Rigoulet, à Makkovik et à l'île Square ont été modernisées et des halles communautaires ont été aménagées à Saint-Modeste-Ouest et à l'île Square.

Les coûts des projets concernant les usines de conditionnement du poisson sont partagés à parts égales avec le propriétaire-exploitant de l'usine, tandis que d'autres projets sont entièrement financés par le gouvernement fédéral.

L'ÎLE-DU-PRINCE-ÉDOUARD

Le 7 octobre 1981, le gouvernement fédéral a annoncé l'adoption, pour l'île-du-Prince-Édouard, d'un ensemble de programmes de développement économique de trois ans (du 1^{er} avril 1981 au 31 mars 1984) d'une valeur de 92 millions de dollars. Ces programmes comprennent une entente à frais partagés avec la province prévoyant l'engagement de 53 millions de dollars pour la troisième et dernière étape du Plan d'ensemble de développement de quinze ans, ainsi qu'une stratégie fédérale de développement de l'île-du-Prince-Édouard entraînant des dépenses de 39 millions de dollars, laquelle avait pour

objet d'assurer la mise en œuvre coordonnée des programmes fédéraux créés expressément pour l'île-du-Prince-Édouard.

La stratégie fédérale de développement, qui a exigé l'intervention de cinq ministères fédéraux dont le MEIR, constituera le cadre nécessaire à la participation continue du gouvernement fédéral au développement régional et économique de l'île-du-Prince-Édouard, une fois que le Plan d'ensemble de développement aura pris fin en 1984.

Le Conseil du Trésor a mis sur pied un comité de gestion fédéral présidé par le ministre de l'État au Développement régional et économique et composé de représentants des ministères de l'Expansion industrielle régionale, de l'Agriculture, des Transports, des Pêches et des Océans, et de l'Énergie, des Mines et des Ressources. Ce comité a été chargé de veiller à la coordination de la planification des programmes.

Au cours de l'exercice 1983-1984, les dépenses du MEIR liées au Plan d'ensemble de développement et à la stratégie fédérale de développement de l'île-du-Prince-Édouard se sont élevées à 8 160 560 \$ et à 8 152 417 \$ respectivement.

LES PROGRAMMES ADOPTÉS EN VERTU DE LA STRATÉGIE FÉDÉRALE DE DÉVELOPPEMENT DE L'ÎLE-DU-PRINCE-ÉDOUARD

Le programme d'aide à la petite entreprise

Ce programme a pour objet de promouvoir le développement des petites entreprises de l'île-du-Prince-Édouard en leur offrant l'aide financière nécessaire à la réalisation de projets d'immobilisation non visés par les programmes d'aide actuels du gouvernement fédéral et de créer des possibilités d'emploi et de revenu dans le secteur de la petite entreprise.

L'aide offerte au cours de l'année, dans le cadre du programme, a atteint 615 374 \$ et a permis la réalisation de 37 projets.

Le programme de soutien industriel communautaire

Ce programme a pour objet d'inciter les commissions industrielles locales de l'île-du-Prince-Édouard à promouvoir, à coordonner et à mettre en œuvre des activités de développement économique dans les localités qui relèvent de leur compétence.

L'aide offerte au cours de l'année, dans le cadre du programme, a atteint 794 247 \$ et a permis la réalisation de trois projets.

installations de camping, ainsi qu'un programme de stimulants financiers pour l'exploitation des hôtels et des motels.

LES AUTRES PROGRAMMES

L'étude sur le marché de la fabrication et du montage du matériel de pêche

- 1. Coût total de l'étude 36 945 \$
- 2. Dépenses en 1983-1984 17 787 \$

3. La proximité de certaines zones de pêche les plus productives du monde, ainsi que le rajoutissement de la flotte de chalutiers offrent des possibilités pour la diversification de la base économique de la péninsule de Burin. L'étude comprend l'analyse du marché du matériel de pêche et des possibilités qui existent pour les habitants de la péninsule de Burin en ce qui concerne la fabrication et le montage de ce matériel.

Le programme de développement industriel et régional (PIDIR)

Mis en place en 1983-1984, le programme de développement industriel et régional remplace le PSDR et un certain nombre d'autres programmes. Voici la description des activités réalisées dans le cadre de ce programme pendant la période d'application :

Nombre net d'offres acceptées	20
Prévision du nombre d'emplois créés	285,5
Investissements admissibles liés à ces offres	8 601 054 \$
Engagements du MEIR au chapitre de ces offres	1 643 017 \$
Total des versements en 1982-1983	700 487 \$

Le programme de subventions au développement régional (PSDR)

Le programme de subventions au développement régional a pris fin en 1983-1984. Au cours de la période d'application, les activités suivantes ont été réalisées :

Cette entente contribue à l'établissement de l'institut de technologie des pêches et des sciences de la mer de Terre-Neuve pour que l'on puisse mieux répondre aux besoins des gens et de l'industrie en matière de formation spécialisée dans le domaine des pêches, des sciences de la mer, de l'exploitation pétrolière et gazière au large des côtes et du développement industriel à l'échelle provinciale et régionale.

L'entente prévoit l'octroi de fonds pour la construction et l'aménagement d'un immeuble de 20 000 mètres carrés sur un terrain de 17 hectares situé sur le chemin Ridgely à Saint-Jean pour y loger quelque 1 000 étudiants. L'installation comprendra une citerne à roules qui facilitera la conception et la mise à l'essai de nouveaux engins de pêche de même que la formation des pêcheurs en vue d'accroître le rendement des prises et la conservation de l'énergie.

L'institut est construit en vertu d'une entente de gestion des travaux qui ont commencé à l'été de 1983. Les services municipaux ont été installés après d'importants travaux de préparation du terrain, et les fondations de l'immeuble ont été achevées à la fin de l'année. A ce moment-là, les travaux d'érection de la charpente d'acier étaient également bien avancés. Les contrats pour tous les grands travaux ont été adjugés. Si l'on maintient le calendrier actuel des travaux de construction, une bonne partie de l'immeuble pourra être occupée dès l'automne de 1985.

La promotion du tourisme

Durée : 1^{er} janvier 1978 au 31 mars 1984

Répartition des coûts :

MEIR	11 938 140 \$
Gouvernement provincial	1 326 460
Coût estimatif total	13 264 600 \$
Dépenses du MEIR à ce jour	11 380 724 \$
Dépenses du MEIR en 1983-1984	1 523 141 \$

Cette entente globale sur la promotion du tourisme vise l'amélioration de la commercialisation touristique et des programmes d'information à l'intention des voyageurs, la mise sur pied d'attractions touristiques et l'expansion des installations d'hébergement pour les touristes.

Les travaux englobent la restauration des maisons historiques Grenfell et Bradley, la construction de chalets touristiques dans l'ouest et l'est de Terre-Neuve, la restauration des maisons, des églises et des magasins du village historique de Trinity, l'amélioration et l'agrandissement des

Le développement industriel, première étape

Durée : 11 juin 1979 au 31 mars 1984

Répartition des coûts :

MEIR	23 985 000 \$
Gouvernement provincial	2 665 000
Coût estimatif total	26 650 000 \$

Dépenses du MEIR à ce jour 22 628 541 \$
 Dépenses du MEIR en 1983-1984 3 654 798 \$

Cette entente a pour objectif de favoriser le développement industriel de la province en commençant par les régions de Corner Brook et de Stephenville, situées dans la partie ouest de Terre-Neuve, grâce à l'aménagement de l'infrastructure nécessaire au développement d'entreprises industrielles et commerciales.

Cette entente prévoit l'octroi de fonds pour l'aménagement d'une zone industrielle de 30 hectares à Corner Brook, la construction d'une voie d'accès directe reliant la Transcanadienne au sud de la ville, le parc et les quais au centre ville, ainsi que la construction d'une voie d'accès qui permettra de relier directement la zone industrielle de Stephenville et le réseau routier de Port-au-Port à la Transcanadienne.

En 1983-1984, le tronçon est de 10 kilomètres de la route d'accès de Corner Brook ayant déjà été bitumé et ouvert à la circulation, les travaux de nivellement des 4,5 derniers kilomètres ont été achevés et la couche de base a été appliquée. L'aménagement de la zone industrielle était presque terminé à la fin de l'année; il ne restait plus qu'à faire l'essai des conduites principales externes d'eau et du réservoir. Des parcelles de terrain ont été mises en vente.

La route d'accès de 23 kilomètres à Stephenville a été ouverte à la circulation en 1982-1983.

Le développement industriel, deuxième étape

Durée : 3 juin 1983 au 31 mars 1988

Répartition des coûts :

MEIR	17 800 000 \$
Gouvernement provincial*	Néant
Coût estimatif total	17 800 000 \$

* La province fournit les emplacements pour les projets.

Dépenses du MEIR à ce jour 200 000 \$
 Dépenses du MEIR en 1983-1984 200 830 \$

Cette entente poursuit et accroît les initiatives de développement économique dans la province, mises de l'avant en vertu d'une entente fédérale-provinciale antérieure, y compris le développement industriel, première étape, notamment par l'aménagement d'une infrastructure industrielle dans certaines collectivités du centre et de l'ouest de Terre-Neuve, afin de favoriser l'établissement ou l'expansion d'entreprises industrielles et commerciales.

L'entente prévoit l'octroi de fonds pour la construction d'une zone industrielle de 9 hectares et de malls industriels à plusieurs localités à Port-aux-Basques ainsi qu'à Pasadena, d'une zone industrielle de 25 hectares à Windsor et d'une autre de 44 hectares à Gander. Le gouvernement fédéral assure la mise en œuvre des projets, tandis que l'administration provinciale fournit les terrains nécessaires et se chargera des travaux courants d'exploitation, d'entretien et de réparation des installations achevées. L'entente permet également d'affecter des fonds à la promotion des projets de développement et à l'exécution d'études de développement industriel.

Le ministère fédéral des Travaux publics est chargé de mettre en œuvre les travaux d'immobilisation au nom du MEIR et a retenu les services de conseillers en conception pour quatre des cinq projets. Les conseillers ont recueilli des renseignements pertinents sur les emplacements et ont communiqué avec des organismes de réglementation et d'autres parties intéressées. Les travaux préliminaires de conception des zones industrielles de Port-aux-Basques et de Gander ont été approuvés par les Travaux publics et le MEIR, et les travaux de conception détaillée ont été entrepris. Des appels d'offres pour les deux projets devraient être lancés en juin 1984. Dans le cas de tous les projets, à l'exception du malle de Port-aux-Basques, les travaux de construction devraient commencer en 1984-1985.

Une étude de l'offre et de la demande portant sur les terrains industriels des péninsules d'Avalon et de Burin est en cours.

L'institut de technologie des pêches et des sciences de la mer

Durée : 16 mai 1983 au 31 mars 1987

Répartition des coûts :

MEIR	27 500 000 \$
Gouvernement provincial	14 500 000
Coût estimatif total	42 000 000 \$

Dépenses du MEIR à ce jour 1 725 414 \$
 Dépenses du MEIR en 1983-1984 1 725 414 \$

Les fonds seront utilisés, s'il y a lieu, pour venir en aide à l'usine de la Bowater Newfoundland Limited à Corner Brook et à celle de l'Abitibi-Price Inc. à Grand Falls.

Le développement communautaire de la région côtière du Labrador

Durée : 29 mai 1981 au 31 mars 1987

Répartition des coûts :

33 800 000 \$	MEIR
5 196 000	Gouvernement provincial
38 996 000 \$	Coût estimatif total

21 565 143 \$	Dépenses du MEIR à ce jour
8 083 320 \$	Dépenses du MEIR en 1983-1984

Cette entente comprend les éléments suivants : la reconstruction et le bitumage de la route Straths dans le sud du Labrador, ainsi que des routes reliant les localités du Sud-Est, l'amélioration du réseau d'adduction d'eau et des installations sanitaires domestiques, la construction de nouvelles cliniques médicales et le financement d'études préliminaires concernant l'expansion de la petite industrie dans la région.

Un tronçon de 50 kilomètres de la route Straths a été reconstruit et bitumé. La route d'accès entre les localités de Williams Harbour et George's Cove a été achevée et des travaux de construction de la route entre les localités de Mary's Harbour et de Lodge Bay ont été entrepris. Cette dernière sera achevée au cours de la saison de la construction de 1984.

Des travaux d'aménagement de conduites d'eau et d'égouts ont été entrepris à L'Anse-au-Clair, à Forteau, à l'Anse-au-Loup et à Cartwright. Ces travaux sont presque terminés. Des marchés ont été attribués pour la construction de réseaux à Mary's Harbour. Le nouvel immeuble à Black Tickie est toujours en construction, les travaux de conception pour la rénovation de l'installation de Cartwright sont terminés et la rénovation devrait commencer sous peu.

Des études et des projets pilotes dans le secteur du tourisme, de l'agriculture, de l'établissement du cadastre, des mines, des communications, de la formation, de l'éducation des trappeurs, ainsi que de la gestion des hardes de caribous sont en cours.

secteur rural de la province. Au nombre des initiatives, mentionnons l'aide aux associations de développement régional constituées en société pour leur permettre de mener à bien des travaux administratifs et communautaires, l'aide aux associations d'artisanat et aux artisans, ainsi que l'aide aux petites entreprises rurales.

L'aide aux associations de développement régional comprend le financement à des fins purement administratives, la formation, ainsi que la planification et la mise en oeuvre de projets de développement communautaire locaux qui peuvent varier d'une usine de première transformation du poisson à une filature de laine.

Un appui financier est offert aux petites entreprises rurales qui ne sont pas admissibles à de l'aide dans le cadre du programme de subventions au développement régional, telles que les entreprises de construction de bateaux, d'ébénisterie, de transformation du poisson et les petites fabriques. L'artisanat est subventionné grâce à de l'aide accordée pour la conception et l'amélioration de la production et de la commercialisation.

Cette entente a pris fin le 30 septembre 1983 et des négociations sont en cours pour en arriver à une nouvelle entente avec la province. Dans l'interval, le ministère fournit directement de l'aide financière aux associations de développement et d'artisanat.

La modernisation des usines de pâtes et papiers

Durée : 1^{er} juin 1981 au 31 mars 1986

Répartition des coûts :

30 000 000 \$	MEIR
3 333 000	Gouvernement provincial
33 333 000 \$	Coût estimatif total

Néant	Dépenses du MEIR à ce jour
Néant	Dépenses du MEIR en 1983-1984

Dans le cadre de cette entente, les gouvernements fédéral et provincial participeront conjointement à un programme de subventions à l'intention de l'industrie des pâtes et papiers de Terre-Neuve. L'entente a pour objectif d'améliorer la viabilité, l'efficacité et la compétitivité internationale de l'industrie terre-neuvienne des pâtes et papiers en accélérant et en maximisant les investissements et en favorisant au sein du secteur privé les politiques qui concourent à la saine gestion des forêts, à la lutte contre la pollution et à la modernisation industrielle.

TERRE - NEUVE

Une fois de plus cette année, les fonds dépensés par le ministère à Terre-Neuve ont surtout servi à mettre en œuvre les ententes auxiliaires qui découlent de l'ECD. De nouvelles ententes portant sur le développement industriel, deuxième étape, et sur l'institut de technologie des pêches et des sciences de la mer ont été conclues.

En vertu de l'entente auxiliaire sur le développement industriel, deuxième étape, le gouvernement fédéral est en train de construire une série de malls de lancement d'entreprises et de zones industrielles dans des endroits stratégiques, c'est-à-dire le centre et l'ouest de Terre-Neuve. Conformément à l'entente concernant l'institut, les deux niveaux de gouvernement participent à la construction d'une installation qui remplacera le Fisheries College à Saint-Jean afin de répondre aux nouveaux besoins en matière de formation dans le domaine des sciences de la mer et de l'exploitation au large des côtes.

Des modifications ont été apportées aux ententes auxiliaires sur le développement rural et sur la promotion du tourisme au cours de l'année, et le programme de développement industriel et régional du ministère a été bien accueilli. Les sommes réservées pour certaines initiatives qui devaient être mises en œuvre en 1983-1984 n'ont pas été dépensées. La Société de développement de Terre-Neuve et du Labrador n'a pas obtenu d'avances de fonds, car les entreprises terre-neuviennes ont réduit considérablement les investissements dans les projets de nouvelles installations et d'équipement. Aucun fonds n'a été attribué pour la nouvelle entente de développement rural, l'expansion de l'industrie océanique et la mise en œuvre de la nouvelle initiative de promotion du tourisme, ces nouveaux projets n'ayant pas encore été approuvés.

On trouvera dans les pages suivantes une description des activités entreprises par le bureau de la région de Terre-Neuve dans le cadre des ententes auxiliaires et d'autres programmes au cours de 1983-1984.

LES ENTENTES AUXILIAIRES

Le Labrador

Durée : 3 décembre 1976 au 31 mars 1984
Répartition des coûts :

MEIR	18 258 300 \$
Santé et Bien-être social	1 404 000 \$
Gouvernement provincial	2 434 700
Cout estimatif total	22 097 000 \$
Dépenses du MEIR à ce jour	17 037 720 \$
Dépenses du MEIR en 1983-1984	174 186 \$

Les éléments de cette entente provisoire comprennent l'aménagement d'une infrastructure municipale et le développement économique de la région du lac Melville, la construction d'un pont à North West River, l'aménagement d'une zone industrielle pour desservir Wabush-Labrador City et l'amélioration de la qualité de l'eau, des installations sanitaires et de l'accès aux services médicaux pour les habitants de la côte.

Une zone industrielle de 32 hectares a été construite à Wabush pour desservir l'ouest du Labrador et le nord-est du Québec; un pont a été construit à North West River pour relier les deux rives de la localité et la partie nord à Goose Bay et Churchill Falls; les rues et l'apparence des quartiers ont été améliorées à Happy Valley-Goose Bay, et une résidence pour les étudiants de l'école professionnelle est en voie de construction. Une société de développement a été fondée pour encadrer le développement économique. Des conduites d'eau et des égouts ainsi que des usines d'épuration ont été aménagées dans certaines localités côtières. Des cliniques médicales ont été construites pour répondre aux besoins essentiels des habitants de trois localités côtières isolées. Des études des hardes de caribous, des études biophysiques, des plans communautaires et la planification des transports et des ports ont été entrepris.

Le développement rural

Durée : du 1^{er} avril 1978 au 30 septembre 1983
Répartition des coûts :

MEIR	15 122 000 \$
Gouvernement provincial	680 000
Cout estimatif total	16 802 000 \$
Dépenses du MEIR à ce jour	14 827 135 \$
Dépenses du MEIR en 1983-1984	2 238 556 \$

Cette entente poursuit les activités déjà entreprises visant à revitaliser et à renforcer le

LES ACTIVITÉS RÉGIONALES

Outre les programmes exposés précédemment, le personnel du nouveau ministère a continué d'administrer les ententes auxiliaires du ministère de l'Expansion économique régionale et le programme de subventions au développement régional.

Ces activités sont groupées par province et territoire.

restreint pleinement informé des principaux événements qui ont eu cours au sein de l'industrie.

Enfin, il convient de mentionner les travaux menés relativement aux activités de la Direction générale sous la forme d'une participation active et de la rédaction de documents de travail pour les délibérations du Comité du tourisme de l'Organisation de coopération et de développement économique, l'apport d'importantes données pour le débat sur le tourisme lancé par l'opposition à la Chambre des communes et les travaux menés par la plupart des sections pour répondre aux nombreuses demandes de renseignements du ministre.

Le Groupe des communications de marketing outre-mer s'est occupé de programmes sur les principaux marchés (Royaume-Uni, République fédérale allemande, France, Hollande, Mexique, Australie et Japon) et a mené des activités sur des marchés en plein essor comme celui de Hong-kong.

Voici certains faits saillants des programmes. Pour la France, une vaste campagne a été organisée sous la forme d'articles de fond accompagnés de photographies à l'occasion du 450^e anniversaire de l'arrivée de Jacques Cartier au Canada. Pour le Royaume-Uni, une campagne sur la coopération entre partenaires a été menée grâce aux fonds supplémentaires alloués. Pour la République fédérale allemande, la stratégie visant les consommateurs a été considérablement améliorée en vue de sensibiliser un public plus jeune à une plus vaste gamme de produits. Pour le Japon, l'accent a été mis sur le marché de la jeune clientèle féminine, et des concours ont été organisés à l'intention des consommateurs. Enfin, pour l'Australie, on a eu recours à une personnalité canadienne de marque, Donald Sutherland, et le financement a été assuré conjointement par CP Air et Qantas Airlines.

En outre, des activités de développement des marchés ont été menées en Amérique du Sud, en Asie du Sud-Est et en Europe méridionale; le ministre d'Etat à la Petite entreprise et au Tourisme a visité deux villes américaines, commençant ainsi la visite de six villes pour promouvoir l'Année du tourisme et accroître les activités publicitaires aux Etats-Unis.

LES SERVICES A LA GESTION

Les Services à la gestion assurent une aide soutenue à la recherche en faisant effectuer des études de l'offre, de la demande, des analyses coûts-avantages et des études de l'incidence du tourisme, notamment en tenant à jour une vaste base de données touristiques. En outre, ils planifient, élaborent et recommandent des politiques; ils suivent de près les activités menées en vertu des programmes et font fonction, par l'entremise du Secrétariat de la coordination, de point central en ce qui concerne les relations entre le gouvernement et l'industrie. Enfin, les Services à la gestion sont chargés de véhiculer l'information liée au tourisme au sein du MEIR.

Au cours de l'exercice financier 1983-1984, la principale fonction de la Direction de la politique globale et de la planification de la stratégie a consisté à étudier toute une série de questions de politique, en portant une attention toute particulière à l'incidence de la taxation sur le tourisme. En outre, une étude a été mise en train sur la question de la technologie en matière touristique.

La Section recherche et analyse a confié à Statistique Canada la collecte des données pour l'Enquête sur les attitudes et les motivations des Canadiens à l'égard du tourisme. Des études de marché ont été menées au Royaume-Uni, en France, aux Pays-Bas et à Singapour, et une enquête sur les attitudes a été effectuée à Hong-kong. Une nouvelle étude de suivi a été menée afin d'évaluer l'incidence de la campagne publicitaire menée au Canada. De plus, l'analyse des données relatives à l'Enquête sur les voyages des Canadiens de 1982 s'est poursuivie.

Le Groupe chargé de la planification et de l'évaluation a dressé un plan à court terme pour la gestion des projets de traitement électronique des données, ainsi qu'un plan opérationnel à long terme pour le tourisme. Parmi les activités innovatrices susceptibles d'être bénéfiques pour le MEIR, mentionnons le lancement d'un projet pilote de bureau technique dont la première étape a été menée à bonne fin, et l'essai d'un questionnaire sur les départs.

Outre l'aide qu'il fournit en matière de logistique pour organiser la Conférence de représentants officiels canadiens du tourisme et la Conférence fédérale-provinciale sur le tourisme, le Secrétariat de la coordination a pour suivi ses efforts en vue d'établir un dialogue avec les syndicats par l'entremise du Congrès du travail du Canada, et il s'est occupé des travaux de secrétariat du nouveau Conseil consultatif du tourisme chargé de conseiller le ministre. Enfin, le secrétariat s'est occupé des activités liées au programme des médailles du tourisme qui a pour objet de récompenser les personnes qui ont fourni des services remarquables à l'industrie touristique à l'échelle du pays et des provinces.

Grâce au périodique de format tabloïd qu'il publie, le Service d'information a tenu la clientèle externe au courant des activités d'ordre touristique menées au sein du MEIR. En outre, un bulletin soulignant les faits d'intérêt public et une revue de presse reprenant les principaux articles de journaux traitant des divers sous-secteurs touristiques ont tenu un public

Au cours de l'exercice financier, plus de 15 millions de dollars ont été alloués pour la construction de palais du commerce et des congrès, dont le Canada Harbour Place à Vancouver et le Palais des congrès du Toronto métropolitain.

De concert avec la Commission de l'emploi et de l'immigration du Canada, le secteur du développement du tourisme a consacré près de 8 millions de dollars pour la réalisation de plus de 40 projets de développement touristique aptes à créer de nombreux emplois.

On a mis, à l'automne 1983, la dernière main à un important projet de formation en cours de préparation depuis près d'un an. Ce projet, intitulé "Le tourisme, c'est votre affaire", comprend un programme de formation à l'aide de vidéocassettes, un manuel d'instruction et un guide de l'élève. Le programme vise à améliorer les capacités de gestion et de conduite des affaires des exploitants de petits et moyens établissements d'hébergement établis dans les collectivités de petite taille ou les régions éloignées ou les ressources didactiques traditionnelles sont moins accessibles.

Jusqu'à maintenant, les émissions ont été diffusées par TV Ontario, Knowledge Network en Colombie-Britannique et le réseau de télécommunications par satellite de l'Atlantique. Des travaux sont en cours sur des questions d'ordre général touchant l'industrie dans des domaines comme la politique relative aux parcs nationaux, la déréglementation aérienne et le transport des voyageurs par chemin de fer.

LE MARKETING DU TOURISME

Voici les activités de marketing du tourisme réalisées cette année.

- On a fait paraître des annonces sur le programme "On part en vacances", dans des périodiques qui sont distribués à plus de 70 % des foyers canadiens.

- Le volume des transactions conclues à l'occasion de la 7e foire internationale "Rendez-vous Canada" tenue à Toronto, du 1er au 5 mai 1983, a atteint 70 millions de dollars, soit une augmentation de 9 millions de dollars par rapport à l'année précédente. Cette foire internationale a attiré 372 organismes vendeurs canadiens, 247 organismes acheteurs étrangers et 31 représentants des médias internationaux.

Le CANMAP

- TourCan, foire nationale annuelle, s'est tenue à Québec du 11 au 15 septembre 1983. Commanditée conjointement par la province de Québec (Tourisme Québec) et la Direction générale du tourisme du MEIR, TourCan 83 a permis à des vendeurs de produits touristiques du Québec de rencontrer des grossistes et des voyageurs de toutes les régions canadiennes.

Lancé le 1er avril 1982, le programme d'aide au marketing du Canada (CANMAP) a eu pour objectif d'accroître la demande pour des installations et des services touristiques canadiens, en incitant l'industrie touristique nationale et internationale, par l'entremise d'un programme à coûts partagés, à créer des circuits forfaitaires canadiens et à les commercialiser sur les marchés intérieurs et étrangers. Le programme a permis d'offrir de l'aide financière jusqu'à concurrence de 25 000 \$ ou 50 % des coûts admissibles, soit le montant le moins élevé des deux.

A en juger par l'échantillonnage de 43 demandes traitées au cours de l'exercice financier 1982-1983, la contribution de 478 495 \$ de Tourisme Canada par rapport à un total de 1 066 856 \$ a suscité une augmentation de 23 260 485 \$ des ventes des produits et services touristiques canadiens.

La banque de données sur les congrès et les voyages de motivation a mis directement à la disposition de l'industrie le profil détaillé de quelque 5 400 organismes américains susceptibles de se réunir au Canada.

Environ 400 dirigeants d'associations, planificateurs de congrès et instigateurs de voyages de motivation ont pu visiter les principales destinations canadiennes dans le cadre du programme de visite d'inspection des lieux. Une augmentation de 23 % des recettes issues des congrès et des réunions a été enregistrée par la société de promotion des ventes représentant Tourisme Canada aux États-Unis. Cette augmentation s'explique partiellement par les fonds supplémentaires consacrés à cette activité.

La Direction générale du tourisme a favorisé la tenue d'un examen du programme de Douanes Canada, ce qui a permis d'améliorer les formalités régissant l'entrée au Canada des participants aux réunions, congrès, expositions et voyages de motivation. En outre, un décret a permis de modifier considérablement et de simplifier les règlements et les lignes directrices qui régissent l'entrée de ces groupes au Canada.

En 1983-1984, la Direction générale a renforcé le processus de planification opérationnelle et a participé à une série fort réussie de séances de planification régionale-sectorielle visant à mieux canaliser les ressources dans le but de remplir le mandat du nouveau ministère.

LE TOURISME

L'industrie touristique canadienne est composée de plus de 100 000 entreprises qui, pour la plupart, sont de petite taille et appartiennent à des Canadiens. À elles toutes, elles emploient directement quelque 600 000 Canadiens, ce qui représente une importante contribution à la population active du pays.

Au total, environ 13 millions de visiteurs étrangers ont séjourné au Canada en 1983, ce qui constitue une augmentation de 1 % comparativement à 1982. Le nombre de touristes américains ayant séjourné au Canada une nuitée ou plus s'élève à plus de 11 millions, soit une hausse de 2,4 % comparativement à 1982. Le nombre de touristes en provenance d'autres pays a atteint environ 1,6 million en 1983, soit une diminution de 8,1 % par rapport à l'année précédente.

Bien que le nombre de séjours au Canada effectués par les touristes venus du Japon, de Hong-kong et d'Israël ait augmenté en 1983, cette hausse a été contrebalancée par la diminution du nombre de touristes en provenance de marchés d'outre-mer traditionnels comme le Royaume-Uni, la République fédérale allemande, la France et les Pays-Bas.

Le nombre de Canadiens qui ont séjourné une nuitée ou plus à l'étranger s'est établi à 13,7 millions, soit une augmentation de 15,2 % par rapport à 1982. Le tourisme international a rapporté 3,9 milliards de dollars au Canada en 1983, ce qui représente une augmentation de 3,5 % par rapport à l'année précédente (3,7 milliards de dollars). Les Canadiens en voyage à l'étranger ont dépensé 5,9 milliards de dollars en 1983, soit 18,6 % de plus que les 5 milliards de 1982.

En conséquence, le déficit du Canada au chapitre des voyages internationaux a augmenté de 62,5 %, passant de 1,3 milliard de dollars en 1982 à 2,1 milliards de dollars en 1983.

LE DÉVELOPPEMENT DU TOURISME

Les services de la Direction générale du tourisme à Ottawa sont chargés de l'aide à l'industrie touristique canadienne. La Direction générale compte trois secteurs : le Développement du tourisme, le Développement du marketing et les Services à la gestion.

L'instauration du nouvel objectif fédéral de développement économique et la mise en œuvre d'activités dans le cadre du MEIR ont eu pour effet d'engendrer de nouvelles activités liées au développement du tourisme. Étant donné que le programme de développement industriel et régional (PDIR) s'est adressé, entre autres, au secteur du tourisme, le développement du tourisme a fait partie des domaines visés par la politique du MEIR en matière de programmes. Au cours de l'été 1983, de nombreuses ressources humaines ont été affectées à l'élaboration de politiques et de critères concernant la mise en œuvre du programme à l'intention de l'industrie touristique.

À la suite de l'instauration du PDIR, le gouvernement fédéral et les provinces ont entamé des négociations portant sur les nouvelles ententes de développement économique et régional (EDER). En vertu de ces EDER, les ministres ont demandé que soient élaborés des ententes auxiliaires ou des protocoles d'entente sur le tourisme entre le gouvernement fédéral et toutes les provinces, ainsi que les territoires. C'est au groupe chargé du développement du tourisme qu'a été confiée la responsabilité des consultations fédérales-régionales et de la coordination à assurer relativement à ces documents. Jusqu'à maintenant, plusieurs ententes ont été conclues, et d'autres en sont à divers stades d'élaboration.

Les activités traditionnelles reliées au développement du tourisme ont continué à porter fruit au cours du dernier exercice financier. On a parallèlement les premiers colloques sur l'investissement à Hong-kong et à Singapour dans le cadre du programme de stimulation des investissements touristiques. Organisés conjointement avec les missions du ministère des Affaires extérieures, ces colloques ont attiré plus de 150 participants. Des présentations ont été organisées pour faire valoir l'industrie touristique canadienne et les possibilités qu'elle offre en matière d'investissement et pour faire connaître le contexte et la structure canadienne en matière d'investissement.

LA DIRECTION GÉNÉRALE DE L'ÉVALUATION DES PROGRAMMES

La Direction générale fournit des renseignements sur l'efficacité des programmes du ministère et recommande les changements appropriés. Les principales activités menées au cours de l'année ont été des études d'évaluation dans les secteurs de la commercialisation, de l'innovation et des pâtes et papiers et des études préparatoires sur le programme d'adaptation de l'industrie et de la main-d'œuvre et le programme de gestion de la mise au point des produits. Des cadres d'évaluation ont également été réalisés pour le programme de réassurance des prêts, le programme de développement du tourisme et le programme de subventions aux investissements des petites entreprises. En outre, la Direction générale a évalué un certain nombre d'ententes auxiliaires de concert avec le personnel des bureaux régionaux chargé de l'évaluation des programmes.

LA DIRECTION GÉNÉRALE DES MÉTHODES DE GESTION

La Direction générale coordonne le plan d'action mis en application par la direction du ministère en vue d'améliorer les méthodes et les vérifications de gestion, et effective des études visant à élaborer, à améliorer et à intégrer les processus de gestion. À cet égard, la Direction générale répond aux exigences du Bureau du contrôleur général, conformément à son programme de perfectionnement des pratiques et contrôles de gestion.

Le plan d'action de gestion sert de tribune permettant l'élaboration et la mise en œuvre de tâches visant à instaurer et à maintenir de saines méthodes de gestion au sein du ministère. Au cours de l'année, l'accent a été mis sur le processus de planification du ministère, et notamment sur la préparation d'un cadre opérationnel. Des progrès ont également été accomplis dans l'élaboration d'indicateurs de rendement, tâche qui constitue une première étape vers la mise au point d'une stratégie d'accroissement de la productivité du ministère.

LA DIRECTION GÉNÉRALE DE LA GESTION DE L'INFORMATION

La Direction générale est chargée de l'application des principes de gestion à toutes les ressources du ministère affectées à l'information. Elle est également chargée de mettre en œuvre la politique ministérielle et s'occupe de la planification connexe.

Les activités de la Direction générale ont porté essentiellement sur le plan des systèmes à long terme du ministère, la coordination des activités d'intégration liées aux systèmes d'information du ministère et sur l'établissement d'un cadre stratégique mettant tout particulièrement l'accent sur les micro-ordinateurs et la bureautique.

LE BUREAU D'ACCÈS À L'INFORMATION ET DE PROTECTION DES RENSEIGNEMENTS PERSONNELS

Le bureau a été créé à la suite de l'adoption par le gouvernement d'une Loi sur la protection des renseignements personnels. Les principales responsabilités du bureau sont de répondre aux demandes de renseignements du public concernant l'accès à l'information, d'élaborer la politique et de conseiller la haute direction en ce qui a trait à l'application de ces lois et au traitement des dossiers.

Au cours de l'année, des fondements solides ont été jetés en vue de l'application judicieuse de la Loi sur l'accès à l'information et de la Loi sur la protection des renseignements personnels. Plus précisément, le bureau a organisé des séances d'information et préparé de la documentation sur les éléments essentiels de ces lois et sur leur incidence à l'intention des hauts fonctionnaires du ministère.

Du 1^{er} juillet 1983 au 31 mars 1984, le bureau a reçu 43 demandes officielles en vertu de la Loi sur l'accès à l'information, et 3 demandes concernant la Loi sur la protection des renseignements personnels. En outre, un certain nombre de demandes ont été réglées de façon officieuse, mais le bureau n'a pas consigné de données à ce sujet. Cette pratique est conforme à la politique du ministère qui encourage les fonctionnaires à utiliser les réseaux de communications internes pour obtenir de l'information.

LA DIRECTION GÉNÉRALE DE LA GESTION DES PORTEFEUILLES

La Direction générale coordonne le processus de planification opérationnelle du ministère. Grâce au plan opérationnel, la Direction générale est chargée d'établir l'orientation générale du ministère, d'harmoniser les activités régionales, sectorielles et les activités de soutien, d'évaluer le rendement opérationnel et de veiller au respect de l'obligation redditionnelle des comptes.

LE CONTRÔLEUR

Le contrôleur fournit des avis objectifs et des services de soutien à la gestion en ce qui concerne l'élaboration de la politique et la direction des programmes. Il est chargé de la conception et de la coordination du processus de planification et de contrôle employé par les gestionnaires du ministère, des services financiers et d'information et des services de soutien à la gestion.

Les fonctions des directions relevant du contrôleur et leurs principales activités sont présentées ci-dessous.

LA DIRECTION DE LA GESTION DES RESSOURCES

La Direction générale est chargée de fournir des avis sur la gestion et l'affectation des ressources aux hauts fonctionnaires et aux autres centres de responsabilité du ministère afin de veiller à ce que l'affectation des ressources soit conforme aux priorités du gouvernement et du ministère. La Direction générale de la gestion des ressources participe à la plupart des activités de planification, de programmation et de budgétisation, et fournit des avis relativement à l'incidence sur les ressources et la politique des propositions de projets et de programmes.

La Direction générale consolide le plan opérationnel pluriannuel, prépare le budget principal des dépenses et le budget supplémentaire, affecte les budgets et exerce un contrôle à cet égard.

LA DIRECTION GÉNÉRALE DES OPÉRATIONS FINANCIÈRES

La direction est chargée d'élaborer et de mettre en œuvre la politique et les systèmes en matière de finances, de rendre compte des ressources financières et de les contrôler, de vérifier les projets d'aide et de fournir des conseils d'ordre financier.

Au cours de l'exercice, les services financiers très différents de ceux existant antérieurement au MEER et au MIC ont été réorganisés, le système de gestion comptable des ressources a été mis sur pied et la politique relative à la vérification des projets a été établie.

LA DIRECTION GÉNÉRALE DES SERVICES ADMINISTRATIFS

La Direction générale est chargée de la politique administrative, des manuels et des directives, de l'impartition des contrats et de l'administration du matériel, de l'administration des biens, des télécommunications, de l'imprimerie et de la reproduction, du traitement de texte, de la gestion des formulaires, de la gestion des dossiers, de la micrographie, des services de courrier et de messagerie, des services de voyage, de la bibliothèque, de la bibliothèque et de la gestion des sections administratives au siège central du ministère.

Au cours de l'année, les principales activités de la direction ont consisté essentiellement à terminer l'intégration des deux ministères antérieurs, à élaborer et à mettre en œuvre de nouvelles politiques et méthodes pour répondre aux besoins du nouvel organisme, et à mettre au point diverses initiatives visant à accroître l'efficacité des services offerts. La Direction générale a également consacré beaucoup de temps à élaborer des mécanismes de service et de soutien pour les bureaux régionaux du ministère.

LA DIRECTION GÉNÉRALE DES SERVICES INFORMATIQUES

La Direction générale est chargée de la mise au point et de la maintenance du logiciel de conception des systèmes informatisés et voit à l'utilisation de tous les services informatiques, y compris le matériel et les réseaux de communication des données. Le ministère a consacré 9,1 millions de dollars en 1983-1984 aux achats de biens et de services liés au traitement des données auprès du secteur privé.

Le fusionnement du MEER et du MIC a obligé la direction à concevoir de nouveaux systèmes d'information pour répondre aux besoins du nouveau ministère. La Direction générale des services informatiques a donc élaboré et mis en œuvre un éventail d'importants systèmes d'information de gestion dans les domaines des finances, des programmes et des sociétés. Elle a également établi un Centre de la micro-informatique qui aide maintenant les autres directions à acquérir et à utiliser des micro-ordinateurs afin d'accroître leur efficacité.

métallique et de la machinerie. Au nombre des autres secteurs bénéficiaires, citons ceux des produits minéraux non métalliques, des produits de caoutchouc, des produits en matière plastique et de la vente en gros de métaux, de quincaillerie, d'articles de plomberie, de matériel de chauffage et de matériaux de construction.

Projets autorisés en vertu du
programme d'aide à l'adaptation de
l'industrie et de la main-d'œuvre,
par grand secteur industriel, 1983-1984

Tableau 14

Montant
(en millions
de dollars)

Grand secteur industriel de projets	Nombre	Montant (en millions de dollars)
Mines	3	956
Aliments	8	1 533
Produits en caoutchouc	2	6 097
Produits en matière plastique	6	2 367
Produits en cuir et	2	1 284
produits connexes	2	260
Produits textiles	2	55
Bois	3	79
Mobilier et	2	19
installations fixes	1	108
Produits du papier	1	251
et produits connexes	3	7 063
Impimerie, édition	10	3 305
et produits connexes	21	11 154
Machinerie	23	200
Matériel de transport	2	10 300
Produits électroniques	3	241
Produits minéraux	3	138
non métalliques	1	
Produits chimiques	2	121
Autres produits	2	247
manufacturés	2	2 723
Industries de la	2	52
construction lourde	2	48 812
et industries		
Véhicules, pièces et		
accessoires d'automobile		
- grossistes		
Métaux, quincaillerie,		
plomberie, matériel de		
chauffage et matériaux		
de construction		
- vente en gros		
Machinerie, matériel		
et accessoires		
- vente en gros		
Services commerciaux		
Total		

Le programme d'aide à l'industrie et de la main-d'œuvre

Dans le cadre d'un programme d'envergure mis en oeuvre par le gouvernement en janvier 1981, douze collectivités réparties dans plusieurs régions du pays ont été désignées, au cours des deux derniers exercices financiers, comme étant admissibles aux subventions fédérales visant à réduire le chômage. Ce programme visait à éliminer la détresse des collectivités canadiennes en proie aux bouleversements majeurs et permanents que connaissent les industries et aux licenciements de travailleurs de la région qui y sont reliés. Le programme a été abrogé en mars 1984.

En 1983-1984, 48,8 millions de dollars ont été alloués pour la réalisation de 106 projets (voir tableau 13). Environ 80 % de ces projets étaient réalisés en Ontario, alors que le Québec se partageait la plupart des autres.

Tableau 13
Projets autorisés en vertu du
programme d'aide à l'adaptation de
l'industrie et de la
main-d'œuvre, par province et
territoire, 1983-1984

Montant
(en millions
de dollars)

Nombre de projets	Montant (en millions de dollars)
Terre-Neuve	-
Île-du-Prince-Édouard	-
Nouvelle-Écosse	3
Nouveau-Brunswick	-
Québec	17
Ontario	84
Manitoba	-
Saskatchewan	-
Alberta	-
Colombie-Britannique	2
Yukon et T. N.-O.	-
Total	106
	48,8

La ventilation par secteur industriel indique que la moitié des projets relevaient de ceux du matériel de transport, des produits de fabrication

Tableau 12
Projets autorisés en vertu du
programme de productivité de
l'industrie du matériel de défense,
par grand secteur industriel, 1983-1984

Montant
(en milliers
de dollars)

Grand secteur industriel	Nombre	Montant (en milliers de dollars)
Produits en	1	582
matière plastique		
Première transformation	15	1 882
des métaux		
Produits de fabrication	1	83
métallique		
Machinerie	2	813
Matériel de transport	78	33 784
Produits électroniques	46	33 926
Produits chimiques	3	1 353
Autres produits	4	1 769
manufactures		
Total	155	74 922

Le programme d'aide aux constructeurs de navires

Le programme d'aide aux constructeurs de navires (PACN) accorde de l'aide aux constructeurs et la navires établis qui assurent la construction et la conversion de navires aux dimensions minimales exigées. De l'aide est également versée pour la réalisation de projets visant à augmenter la productivité des chantiers navals.

L'an dernier, de l'aide totalisant 42,4 millions de dollars a été accordée pour la réalisation de 48 projets. Vingt-deux projets d'une valeur de 5,1 millions ont reçu des subventions au titre de la construction ou de la conversion de navires et de l'accroissement de la productivité des chantiers respectivement.

Au total, 155 projets d'une valeur de 74,9 millions de dollars ont été approuvés en 1983-1984 (voir tableau 11). La ventilation par élément de programme indique que 16 projets de R. et D. ont reçu 25,1 millions de dollars, que 79 projets d'établissement de fournisseurs en ont reçu 31,8 millions, que 57 projets d'investissement se sont partagé la somme de 17,6 millions de dollars et que trois études de faisabilité ont reçu 0,4 million de dollars. La plupart des initiatives ont émané d'entreprises manufacturières situées en Ontario et au Québec.

Tableau 11

Projets autorisés en vertu du
programme de productivité de
l'industrie du matériel de défense,
par province et territoire, 1983-1984

Montant
(en millions
de dollars)

Nombre
de prêts

Montant (en millions de dollars)	Nombre de prêts	
-	-	Terre-Neuve
-	-	Île-du-Prince-Édouard
0,4	3	Nouvelle-Écosse
-	-	Nouveau-Brunswick
25,4	48	Québec
32,7	95	Ontario
1,4	4	Manitoba
-	-	Saskatchewan
-	-	Alberta
15,0	5	Colombie-Britannique
-	-	Yukon et T. N.-O.
74,9	155	Total

La ventilation par secteur de l'industrie indique que 78 projets totalisant 33,8 millions de dollars relevaient du Secteur du matériel de transport. Quarante-six autres projets du secteur des produits électroniques et électroniques se sont partagé à peu près la même somme.

réinvesti cette somme au cours de la période admissible, soit après le 28 juin 1982 et avant le 1^{er} avril 1983.

Vu la baisse rapide des taux d'intérêt après le 28 juin 1982, la moyenne des subventions accordées en vertu du programme a été bien inférieure au plafond de 4 % par année.

En 1983-1984, les subventions accordées en vertu du SIPE ont totalisé près de 4,2 millions de dollars. Comme le démontre le tableau 10, l'Ontario a été la principale bénéficiaire, suivi du Québec.

Tableau 10

Subventions versées en vertu du
programme de subventions aux investissements,
des petites entreprises,
par province et territoire, 1983-1984

Montant
(en milliers
de dollars)

Nombre de
subventions

Montant (en milliers de dollars)	Nombre de subventions	
115	101	Terre-Neuve
48	56	Île-du-Prince-Édouard
124	133	Nouvelle-Écosse
105	127	Nouveau-Brunswick
1 049	1 253	Québec
2 203	1 686	Ontario
194	372	Manitoba
325	1 081	Saskatchewan
502	525	Alberta
464	394	Colombie-Britannique
25	14	Yukon et T. N.-O.
4 154	5 742	Total

Le programme de productivité de l'industrie du matériel de défense

Le programme de productivité de l'industrie du matériel de défense (PPIMD) fournit une aide financière aux fabricants de matériel de défense et de produits connexes destinés à l'exportation, afin de maintenir, voire de relever, la compétence technologique de l'industrie canadienne du matériel de défense et des industries civiles connexes. Le programme relève d'accords internationaux en matière de mise au point et de partage de la production du matériel de défense.

Prêts accordés en vertu de la Loi
sur les prêts aux petites entreprises,
par province et territoire, 1983-1984

Tableau 8

Montant
(en millions
de prêts)

Terre-Neuve	402	10,8
Île-du-Prince-Édouard	113	2,7
Nouvelle-Écosse	556	14,3
Nouveau-Brunswick	773	24,1
Québec	11 067	298,9
Ontario	5 984	171,2
Manitoba	817	22,1
Saskatchewan	1 507	41,7
Alberta	2 166	57,5
Colombie-Britannique	5 010	129,8
Yukon	78	1,8
Territoires du Nord-Ouest	38	1,1
Total	28 511	776,0

Le tableau 9 indique la répartition des 28 511 prêts accordés en 1983-1984 en vertu de la Loi sur les prêts aux petites entreprises selon le secteur d'activité. On constate que le secteur des services a été le principal bénéficiaire, suivi de ceux du commerce de détail, de la fabrication et des transports.

Prêts consentis en vertu de la Loi
sur les prêts aux petites entreprises,
selon le secteur d'activité, 1983-1984

Tableau 9

Montant
(en millions
de prêts)

Commerce de gros	1 140	25,6
Commerce de détail	6 928	201,8
Construction	2 794	70,6
Fabrication	2 908	82,3
Services	11 376	309,6
Transports	3 051	79,1
Communications	314	7,0
TOTAL	28 511	776,0

Les subventions aux investissements des petites entreprises (SIPE)

Ce programme, dont la mise en œuvre a été annoncée dans le budget du 28 juin 1982, vise à fournir une aide financière temporaire aux petites entreprises, ainsi qu'aux agriculteurs et aux pêcheurs constitués en société ou non, afin de les inciter à financer :

- 1) l'achat, après le 28 juin 1982 et avant le 31 mars 1983, de nouveaux biens dépréciables à des fins commerciales au Canada;
- 2) des travaux de recherche scientifique entrepris après le 28 juin 1982 et avant le 31 mars 1983.

L'aide prend la forme d'une subvention mensuelle pouvant s'élever à 4 % par année sur les emprunts non remboursés et ce, pendant deux ans à compter de la date d'octroi du prêt qu'une petite entreprise admissible a contracté avec une institution financière, conformément aux pratiques commerciales courantes.

Le prêt admissible consenti à une petite entreprise admissible ou à un groupe d'entreprises connexes devait être d'au moins 10 000 \$ et d'au plus 500 000 \$.

Au total, 5 742 requérants de toutes les régions du pays se sont partagé 358 145 060 \$ et ont

L'industrie canadienne des produits du bois dans le cadre des codes du bâtiment des normes de construction des pays étrangers et auprès de l'industrie locale.

En 1983-1984, on a versé un total de 1,9 million de dollars en vertu du PCMO.

Outre le PDIR et les programmes qui y ont été intégrés, le ministère offre d'autres programmes d'aide qui continuent d'être gérés séparément. Voici un résumé des activités entreprises dans le cadre de ces derniers.

Le programme de subventions aux petites entreprises

Le programme de subventions aux petites entreprises, créé en vertu de la Loi sur les prêts aux petites entreprises pour financer une vaste gamme de projets d'investissement. Les prêts, qui sont garantis par le gouvernement fédéral, sont assujettis à un taux d'intérêt maximal égal au taux préférentiel des banques à charte, plus un pour cent. La durée maximale des prêts est de dix ans.

En 1983-1984, on a consenti 28 511 prêts totalisant 776 millions de dollars (voir tableau 8). Les créances payées pour la même période se chiffrent à 25,4 millions de dollars.

L'un des éléments du PSRD était le programme de la zone spéciale de Montréal (PZSM), qui visait à favoriser l'établissement, l'expansion et la modernisation de certaines industries des secteurs de la fabrication et de la transformation, ainsi que le transfert de la technologie et les activités de recherche et de développement industriel à Montréal et dans les environs. Ce programme a pris fin avec la création du PDIR. Du nombre net d'offres acceptées au Québec selon le tableau 6, 80 l'ont été en vertu du PZSM, pour un montant total de 20 millions de dollars.

Un projet a reçu une garantie de prêt de 500 000 \$ en vertu du PSDR en 1983-1984.

Le programme d'aide aux établissements d'enseignement

Le programme d'aide aux établissements d'enseignement (PAEE) a visé essentiellement à fournir de l'aide financière aux établissements sans but lucratif pour qu'ils puissent mettre sur pied et offrir des services spécialisés à l'industrie et aux particuliers dans le cadre de cours qui ont favorisé indirectement le développement industriel au Canada.

Le programme a prévu également l'octroi de fonds afin de constituer des bourses d'études en gestion ou dans des domaines techniques ou de financer la cueillette de renseignements destinés à appuyer l'élaboration de politiques industrielles.

En 1983-1984, 118 projets ont reçu un total de 793 594 \$ aux termes du PAEE. La majeure partie de cette somme (637 614 \$) a été versée à des institutions sans but lucratif, soit à des centres de recherche universitaires. Le reste a surtout été distribué à des particuliers sous forme de bourses.

Le programme coopératif d'expansion des marchés d'outre-mer

Le programme coopératif d'expansion des marchés d'outre-mer (PCMO) fut l'un des premiers à être incorporés au PDIR. Ce programme visait, en premier lieu, à stimuler la croissance et le développement intégrés de l'industrie des produits du bois en Colombie-Britannique, notamment dans les régions du nord et du centre, en mettant l'accent sur les produits manufacturés de cette industrie et, en second lieu, à faire mieux connaître et accepter les normes, les méthodes de construction et la capacité de production de

Comme le démontre le tableau 6, 420 offres d'aide totalisant 70,9 millions de dollars ont été acceptées en 1983-1984. Les projets ainsi financés devraient amener la création de quelque 6 396 emplois directs et susciter des investissements du secteur privé de l'ordre de 29,1 millions de dollars.

Tableau 6

Nombre net d'offres acceptées en vertu du programme de subventions au développement régional, par province et territoire, 1983-1984

Montant approximatif de la subvention
Nombre net d'offres (en millions de dollars)
acceptées

Total	420	70,9
Terre-Neuve	6	0,5
Île-du-Prince-Édouard	18	2,1
Nouvelle-Écosse	26	4,0
Nouveau-Brunswick	13	2,7
Québec	254	40,4
Ontario	22	10,3
Manitoba	54	4,7
Saskatchewan	19	4,4
Alberta	2	0,1
Colombie-Britannique	5	1,6
Yukon et T. N.-O.	1	1,1

Le tableau 7 présente les données sur le PSDR selon les secteurs de l'industrie. Il en ressort que les principaux secteurs sont ceux des produits du bois, des aliments, des produits de fabrication métallique, du matériel de transport, des produits électriques et électroniques et des produits chimiques.

Nombre net d'offres acceptées en vertu du programme de subventions au développement régional, par secteur industriel, 1983-1984

Tableau 7

Montant approximatif de la subvention
Nombre net d'offres (en milliers de dollars)
acceptées

Secteur industriel	420	70 919
Aliments	64	1 160
Produits en caoutchouc	6	217
Produits en matière plastique	20	3 794
Produits en cuir et produits connexes	2	118
Industries textiles		
de première transformation		
Produits textiles	2	379
Vêtements	-	-
Bois	71	15 258
Mobilier et installations fixes	12	542
Produits du papier et produits connexes	6	720
Imprimerie et édition	16	1 046
Première transformation des métaux	12	2 303
Produits de fabrication métallique	53	6 958
Machinerie	30	3 623
Matériel de transport	23	8 224
Produits électroniques	23	5 382
Produits minéraux non métalliques	13	1 849
Produits raffinés du pétrole	3	321
Produits chimiques	21	10 128
Autres produits manufacturés	23	3 704
Autres produits non manufacturés	20	1 193
Total	420	70 919

**Projets d'innovation autorisés dans le cadre du
programme d'expansion des entreprises, par
secteur industriel**

Secteur industriel	Montant (en millions de dollars)	Nombre de projets
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Mines	1	61
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Aliments	18	1 495
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Produits en caoutchouc	12	711
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Chaussures	1	5
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Bois	8	139
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Mobilier et	10	618
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Installations fixes	2	27
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Produits du papier	3	43
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Métaux primaires	15	1 370
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Métaux primaires	74	19 188
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Métaux primaires	1	150
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Autre matériel	25	10 141
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de transport	158	29 692
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Produits électroniques	3	569
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Produits raffinés	1	14
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du pétrole	4	277
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pharmaceutiques	9	1 079
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chimiques	14	3 388
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Autres produits	20	1 107
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Autres produits	1	15
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non manufacturées	382	70 114
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Toujours entre avril et septembre 1983, 24 projets d'adaptation dans le cadre du PEE ont reçu des garanties de prêts totalisant 15,9 millions de dollars. Cette aide devrait permettre la création ou le maintien de quelque 1 114 emplois au cours des cinq prochaines années.

Tableau 5

**Garanties de prêts autorisées
en vertu du programme d'expansion
des entreprises,
par province et territoire, 1983-1984**

Montant (en millions de dollars)	Nombre de projets
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Terre-Neuve	-	-
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Île-du-Prince-Édouard	-	-
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Nouvelle-Écosse	2	0,9
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Nouveau-Brunswick	2	0,9
-------------------	---	-----

Québec	4	6,0
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Ontario	10	5,5
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Manitoba	4	1,7
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Saskatchewan	-	-
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Alberta	2	0,9
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Colombie-Britannique	-	-
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Yukon et T. N.-O.	24	15,9
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Total	24	15,9
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Le programme de subventions au développement régional

Le programme de subventions au développement régional (PSRD) vise à favoriser la création d'emplois et l'investissement dans les régions à faible croissance du pays. Il prévoit l'octroi d'une aide financière sous forme de subventions et de garanties de prêts aux entreprises et à l'industrie afin de leur permettre de construire, d'agrandir ou de moderniser des installations dans certaines régions désignées du pays.

Comme nous l'avons dit plus tôt, le PSDR a été incorporé au PDIR. En revanche, la Loi sur les subventions au développement régional ne sera abrogée que le 31 décembre 1984. Il a donc été possible de financer en vertu du PSDR les projets soumis après la création du PDIR, en juillet 1983, pourvu que la production commerciale commence avant le 31 décembre 1984.

La mise sur pied du nouveau PDIR a nécessité la combinaison des éléments de plusieurs programmes d'aide financière du MIC et du MEER qui étaient autrefois administrés séparément. Voici les principaux programmes regroupés sous le nouveau PDIR :

- le programme d'expansion des entreprises (PEE);
- l'aide à l'accroissement de la productivité au moyen de techniques (AAPT);
- le programme coopératif d'expansion des marchés d'outre-mer (PCEMO);
- le programme d'aide aux établissements d'enseignement (PAEE);
- le programme sur les subventions au développement régional (PSDR);
- le programme de la zone spéciale de Montréal (PZSM).

Voici un résumé des activités entreprises en 1983-1984 dans le cadre du PEE, de la LSDR, du PCEMO et du PAEE avant que ces programmes ne soient regroupés sous le PDIR.

Le programme d'expansion des entreprises (PEE)

Le PEE visait à aider les entreprises des secteurs de la fabrication et de la transformation à accroître leur rentabilité et leur compétitivité à l'échelle internationale. Il prévoyait le financement du partage des coûts ou, en dernier ressort, l'assurance de prêts à terme. Entre avril et septembre 1983, après quoi le PEE a été intégré au PDIR, 382 projets d'innovation ont reçu une aide totalisant 70,1 millions de dollars (voir tableau 3). De ce nombre, les deux cinquièmes visaient le secteur des produits électroniques et électroniques et un autre cinquième, celui de la machinerie (voir tableau 4). Les prévisions concernant les projets d'innovation entrepris dans le cadre du PEE font état de ventes de 9,5 milliards de dollars au cours des cinq prochaines années et de la création ou du maintien de 6 175 emplois.

Parmi les 382 projets d'innovation du PEE, 107 découlaient de l'aide à l'accroissement de la productivité au moyen de techniques (AAPT) et avaient reçu 5,6 millions de dollars. L'AAPT vise à accroître la productivité de l'industrie canadienne en favorisant l'utilisation de nouvelles techniques de production et de conception et de nouveaux procédés basés sur l'électronique, de même que le recours à la micro-électronique afin d'améliorer la qualité des produits et d'en créer de nouveaux.

Tableau 3

Projets d'innovation autorisés en vertu du programme d'expansion des entreprises, par province et territoire, en 1983-1984

Montant (en millions de dollars)	Nombre de projets
0,2	3
0,8	10
1,8	8
0,1	7
17,9	164
33,4	106
2,0	33
1,6	13
3,9	22
8,4	16
-	-
Total	382
70,1	
	Yukon et T. N.-O.
	Colombie-Britannique
	Alberta
	Saskatchewan
	Manitoba
	Ontario
	Québec
	Nouveau-Brunswick
	Nouvelle-Écosse
	Île-du-Prince-Édouard
	Terre-Neuve

machinerie vient en tête avec 15,5 millions de dollars, suivi de celui des industries de la construction lourde et industrielle.

Tableau 2

Offres acceptées en vertu du PDIR - Nombre et montants estimatifs de l'aide financière depuis le début du programme jusqu'au 31 mars 1984, par grand secteur industriel

Montant approximatif	Nombre de l'aide d'offres (en millions)	Grand secteur industriel
	acceptées (de dollars)	

Aliments 61

Boissons 4

Produits en caoutchouc 3

Produits en matière plastique 17

Produits en cuir 1

Industries textiles 1

de première transformation 1

Produits textiles 1

Bois 42

Mobilier et 19

Installations fixes 1857

Produits du papier 8 772

Impimerie et édition 52

Première transformation 4 267

des métaux 9

Produits de fabrication 5 949

métallique 15 476

Machinerie 39

Matériel de transport 1 111

Produits électriques et 4 387

électroniques 37

Produits minéraux non 797

métalliques 12

Produits raffinés du 17

pétrole et du charbon 1

Produits chimiques 2 983

Autres industries 1 582

industries de la 11 000

construction lourde 3

et industrielle 8 818

Tourisme 326

Autres 24

Total 82 587

en vigueur du PDIR remonte à juillet 1983. Au 31 mars 1984, 381 offres d'aide totalisant 82,6 millions de dollars avaient été acceptées. Les projets ainsi financés devaient permettre le maintien ou la création de 8 688 emplois.

En ce qui a trait aux éléments du programme, les projets de modernisation et d'agrandissement ont accaparé quelque 39 % de l'aide accordée en vertu du PDIR pendant la période en cause, suivis de ceux liés au contexte du développement industriel (22 %), des projets d'innovation (19 %) et des projets d'établissement de nouvelles installations (15 %). Le tableau suivant illustre la répartition par région de l'aide accordée en 1983-1984 dans le cadre du PDIR.

Tableau 1

Offres acceptées en vertu du PDIR - Nombre et montants estimatifs de l'aide financière depuis le début du programme au 31 mars 1984, par province et territoire

Montant approximatif	Nombre de l'aide d'offres (en millions)	acceptées de dollars)
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Terre-Neuve 19

Île-du-Prince-Édouard 19

Nouvelle-Écosse 20

Nouveau-Brunswick 54

Québec 103

Ontario 86

Manitoba 23

Saskatchewan 8

Alberta 21

Colombie-Britannique 25

Yukon et T. N.-O. 3

Total 82,6

Le tableau 2 fournit une ventilation des données sur le PDIR selon les principaux secteurs industriels. On y constate que les secteurs des aliments (61 offres acceptées), du bois, de la machinerie et des produits électriques et électroniques sont les plus importants. Pour ce qui est du montant de l'aide, le secteur de la

En plus de répondre à plus de 3 200 demandes prioritaires de renseignements sur la petite et moyenne entreprise en 1983-1984, le secrétariat a assuré la mise en œuvre du programme d'excellence dans la gestion de la petite entreprise (PEGE), lequel a permis de financer 65 bourses de travail, neuf projets de recherche et la mise sur pied de dix cours.

PROJETS SPÉCIAUX; PROJETS DE DÉVELOPPEMENT; PROJETS D'INVESTISSEMENT; PROJETS D'ADAPTATION

Ces directions sont chargées de l'analyse et de la négociation des projets industriels les plus délicats et les plus complexes requérant une aide du ministère, ainsi que des prêts et des garanties de prêt.

Ce n'est qu'exceptionnellement que les projets sont confiés à la direction générale intéressée par les cadres supérieurs du ministère, car l'expérience a prouvé que les dossiers importants ou délicats peuvent profiter d'une concentration de l'expertise en matière d'analyse qui n'existe pas toujours au sein d'organisations axiales. Le personnel de la direction générale compte donc un grand nombre de spécialistes de l'analyse des questions stratégiques, financières, économiques et commerciales.

En 1983-1984, ces directions ont étudié quelque 18 grands projets comportant une aide éventuelle du gouvernement de l'ordre de 3 milliards de dollars et pouvant avoir une incidence sur l'emploi dans toutes les régions du Canada.

Les plus importants travaux ont porté sur la Pratt & Whitney Canada Inc., la Bell Helicopter et sur les mines de charbon de la Donkin-Morlen, alors que d'autres avaient trait aux sociétés de Haviland, Canadair, Maislin et White Farm. Certains de ces travaux se poursuivront au cours de l'an prochain.

INVESTISSEMENTS DE L'ÉTAT

La Direction des investissements de l'État a été mise sur pied pour aider le ministre à s'acquitter de ses responsabilités relativement aux sociétés d'État. Elle assure également la coordination des relations ministérielles avec ces sociétés, en plus de surveiller leur fonctionnement, leurs stratégies et leurs plans d'affaires.

En 1983-1984, cette direction a assuré le bon fonctionnement de la BFD, de la SDCB, de la SBEL, de la CDIC et de la SEC. Bien qu'elles relevaient également d'autres ministères, la CDIC et la SEC

étaient considérées comme des éléments importants de la politique industrielle et du développement industriel et régional. La direction a également coordonné la prestation de conseils au ministre et aux sous-ministres sur le fonctionnement de ces sociétés.

Quant à la BFD, à la SDCB et à la SBEL, qui relient du ministère, il leur a fallu établir de nouveaux rapports afin d'accroître les pouvoirs, l'imputabilité et la direction du ministère. En plus d'assurer la prestation de conseils sur des questions d'ordre opérationnel et financier, la direction a entrepris plusieurs nouvelles initiatives qui se prolongeront au cours du prochain exercice. De ce nombre, citons la mise en œuvre de nouveaux programmes et la reformulation du mandat de la BFD et de la SBEL, l'examen approfondi des activités de la SDCB et l'étude d'importantes possibilités d'expansion.

LE GROUPE DE L'ÉLABORATION DES PROGRAMMES ET DES OPÉRATIONS

Le Groupe de l'élaboration des programmes et des opérations est chargé d'assurer le soutien des systèmes et des politiques liées aux principaux programmes industriels subventionnés du ministère. Elle voit également à l'application de la Loi sur les prêts aux petites entreprises, laquelle assure l'octroi de prêts garantis aux petites entreprises par des prêteurs désignés du secteur privé.

Voici un résumé des activités entreprises par le ministère en 1983-1984 dans le cadre de ses principaux programmes.

Le programme de développement industriel et régional

Le programme de développement industriel et régional (PDIR) vise à promouvoir le développement industriel et régional en appuyant les initiatives du secteur privé qui sont axées sur les projets, les industries et les techniques offrant les plus grandes possibilités de revenu, de croissance soutenue et de compétitivité sur la scène internationale.

Le PDIR est un nouveau programme dont l'établissement a coïncidé avec le fusionnement des ministères de l'Industrie et du Commerce (MIC) et de l'Expansion économique régionale (MEER) pour créer le MEIR. Le PDIR regroupe d'ailleurs un certain nombre de programmes qui relevaient de l'un ou l'autre des anciens ministères. L'entrée

marché du travail et de la croissance de l'emploi au Canada, qui revêtent toutes une importance cruciale.

LA PLANIFICATION STRATÉGIQUE

La Direction de la politique a participé à plusieurs importantes initiatives au cours de l'année, dont la préparation de l'Orientation des projets spéciaux a été créée au cours de l'exercice financier par le fusionnement de deux anciennes divisions ministérielles, à savoir le Secrétaire à la petite entreprise et la Direction générale des projets régionaux et industriels et des investissements de l'État. La nouvelle stratégie, la direction a coordonné l'élaboration des énoncés des priorités sectorielles et des cadres de développement industriel régional (CDIR). Ces derniers, qui sont rédigés par les bureaux régionaux, offrent un aperçu du contexte économique régional de chaque province et territoire, des possibilités et des obstacles sur le plan du développement industriel et de l'orientation stratégique à moyen terme. Enfin, la direction a également préparé l'Aperçu de la stratégie annuelle du MEIR qui a été soumis au ministre et au président du CCDER.

L'ANALYSE ÉCONOMIQUE ET LES RENSEIGNEMENTS

Deux fois par année, la Direction de la politique procède à l'Enquête sur les intentions d'investissement et publie régulièrement des rapports d'analyse des résultats. L'enquête porte sur près de 500 grandes sociétés de toutes les régions du pays et étudie les changements qui surviennent dans les dépenses prévues, ainsi que les facteurs susceptibles d'en expliquer la cause. Dans le cadre du cycle de planification stratégique annuelle, la Direction de la politique prépare, en se fondant sur le Modèle économétrique canadien pour l'analyse structurelle (MECAS), un aperçu économique à moyen terme mettant un accent spécial sur les dimensions sectorielles et régionales. Elle fournit également des renseignements économiques et des services statistiques et effectuée diverses analyses économiques et simulations à l'appui d'activités et de fonctions ministérielles tant à l'administration centrale que dans les régions. La Direction de la politique est en outre le dépositaire de l'indice du développement à partir duquel sont déterminés les niveaux de l'aide offerte aux termes du PDIR. Une méthode de désignation des régions au premier palier spécial a été mise au point afin que toute détérioration soudaine et marquée de la conjoncture économique dans ces régions soit prise en considération.

PETITE ENTREPRISE ET PROJETS SPÉCIAUX

La Direction générale de la petite entreprise et des projets spéciaux a été créée au cours de l'exercice financier par le fusionnement de deux anciennes divisions ministérielles, à savoir le Secrétaire à la petite entreprise et la Direction générale des projets régionaux et industriels et des investissements de l'État. La nouvelle direction générale compte six directions :

- Secrétaire à la petite entreprise
- Projets spéciaux
- Projets de développement
- Projets d'investissement
- Projets d'adaptation
- Investissements de l'État

LE SECRÉTARIAT À LA PETITE ENTREPRISE

Au nombre des tâches du Secrétaire à la petite entreprise, citons l'élaboration et la coordination de politiques destinées à améliorer l'esprit d'entreprise et le climat dans lequel évoluent les petites entreprises, l'établissement de lignes de communication qui soient plus efficaces et le renforcement du rôle de défenseur du ministre auprès des petites entreprises.

En 1983-1984, le secrétariat a étudié des questions portant sur la petite entreprise et a fourni renseignements et conseils aux autres ministères dont les activités touchent celle-ci. Avec l'aide de conseillers, on a mené des études concernant le coût des transactions effectuées par les petites entreprises, les contributions indirectes affectées aux exportations et les performances des divers secteurs manufacturiers canadiens, eu égard à la taille des entreprises. Ces études ont été dévouées et distribuées aux petites entreprises.

Le Comité consultatif de la petite entreprise (CCPE), qui regroupe 24 membres représentant des universitaires, des organismes et des institutions financières, et qui relève du ministre d'État (Petite entreprise), s'est réuni six fois pour étudier des questions d'actualité qui touchent la petite et moyenne entreprise. Le secrétariat a également publié un rapport statistique sur la petite entreprise, ainsi qu'un bulletin trimestriel intitulé le Monde de la petite entreprise.

Sur le plan international, le groupe a prêté son appui à l'industrie canadienne des produits du bois et au ministère des Affaires étrangères à propos d'une enquête menée par les États-Unis concernant les mesures de compensation réclamées par l'industrie. Il a donné des conseils et accordé son appui pour d'autres questions liées au commerce, dont la limitation des importations d'acier découlant par les États-Unis, les propositions relatives à la libéralisation, par secteur, du commerce bilatéral entre le Canada et les États-Unis, le contingentement du papier journal dans les pays de la CEE, ainsi que les politiques d'importation et les mesures frontalières touchant les secteurs du textile, du vêtement et de la chaussure. Le groupe a continué d'administrer le programme coopératif d'expansion des marchés d'outre-mer en Colombie-Britannique et des négociations ont été entamées avec les provinces et les associations industrielles en vue d'étendre si possible le programme à l'est des Rocheuses.

Dans le domaine de la coopération industrielle, le groupe a participé aux réunions du sous-comité de la coopération industrielle Canada-CEE et du Comité économique mixte Canada-Japon, dont le Canada fut le pays d'accueil. Le groupe s'est acquitté de la tâche d'assurer le suivi de ces réunions et d'évaluer les possibilités de coopération industrielle avec la France, la Chine, l'Australie et la Nouvelle-Zélande.

Au cours de l'année, le groupe a répondu à plus de 1 100 demandes émanant de l'Agence d'examen de l'investissement étranger et traité près de 400 demandes reçues au titre du programme de développement des marchés d'exportation et 300 demandes relatives au tarif douanier. Les spécialistes des secteurs industriels du groupe ont participé aux 50 foires commerciales, missions et colloques, ou davantage, qu'ils avaient organisés au Canada et à l'étranger en vue d'aider les entreprises canadiennes à pénétrer davantage les marchés étrangers.

LA POLITIQUE

En 1983-1984, les fonctions de la Direction de la politique ont été réorganisées de sorte que cette dernière est désormais responsable de l'élaboration et de la coordination des politiques au sein du ministère. Grâce à son Comité de la

politique, la direction est le point central du ministère pour les questions associées au commerce extérieur. Elle effectue des analyses économiques et des recherches sur les politiques stratégiques, et recueille des renseignements à l'intention du ministère. Elle dirige le processus de planification stratégique et, par l'intermédiaire du Bureau du conseiller en politiques (entreprises et syndicats), favorise l'instauration d'un climat de collaboration avec le secteur privé. La direction a été choisie pour fournir des services de secrétariat au Comité de la politique établi au début de 1984. Le Bureau du conseiller en politiques, relations avec les entreprises et les syndicats, constitue le lien principal du ministère avec les organismes représentant le secteur privé et veille à ce que leurs opinions soient dûment considérées. Le Secrétaire à la petite entreprise a été fusionné avec l'ancienne Direction générale des projets régionaux et industriels et des investissements de l'État pour donner naissance à la Direction générale des petites entreprises et des projets spéciaux.

L'ÉLABORATION DES POLITIQUES ET LES CONSULTATIONS INTERMINISTÉRIELLES

En plus d'appuyer le Comité de la politique, la direction a lancé plusieurs grands projets de collaboration des politiques touchant notamment l'investissement, l'aide à l'industrie, le développement régional, les relations fédérales-provinciales dans le domaine du développement industriel et les relations économiques canado-américaines. Quand ce sont d'autres ministères qui jouent le rôle de premier plan, ces initiatives exigent la plupart du temps des discussions interministérielles.

On en est venu à un accord avec le ministère des Affaires étrangères concernant un système de repérage de fournisseurs afin de favoriser l'exploitation des possibilités du commerce extérieur. Un protocole d'entente a été rédigé concernant le détachement de personnel entre le MEIR et le ministère des Affaires étrangères, car une étroite collaboration et un partage des connaissances commerciales s'imposaient. À d'autres égards, la Direction de la politique a contribué à l'établissement du Centre canadien du marché du travail et de la productivité. Le centre, dont les membres du conseil d'administration viennent des milieux d'affaires et du travail, étudiera les questions de l'accroissement de la productivité, des besoins du

- la Direction générale du développement des marchés;
- la Direction générale de la planification et de

l'analyse des politiques.

Pendant l'année 1983-1984, le groupe a poursuivi sa lourde tâche consistant à appuyer l'industrie et d'autres ministères, ainsi que les bureaux régionaux du MEIR dans la mise en œuvre des programmes subventionnés. Il a en outre exécuté plusieurs activités importantes, dont la mise au point et le lancement du nouveau programme des Prix d'excellence du Canada en productivité, innovation et design, d'une durée de cinq ans.

Dans le domaine de l'adaptation, le groupe a commencé à définir le rôle futur du ministère. Plus récemment encore, il a participé activement aux efforts déployés par divers ministères en vue de restructurer les pêches de l'Atlantique et de mettre au point un programme qui succéderait au PAAIM. Il a évalué les aspects techniques et commerciaux des demandes émanant des entreprises du textile, du vêtement et de la chaussure pour le compte de l'Office canadien pour le renouvellement industriel (OCRI) et préparé des séances d'information sur des cas individuels et des questions de principe à l'intention des représentants du ministère au sein de l'OCRI.

Sur le plan de l'innovation, un rapport sur l'état de la biotechnologie à l'échelle nationale et internationale est presque terminé. Il y sera question d'éventuels grands projets dans ce secteur. Enfin, le groupe a organisé des colloques industriels spéciaux portant sur l'innovation et la mise au point de produits dans le secteur laitier et dans celui des pêches.

Au cours de l'année à l'étude, le groupe a pris part aux travaux de plusieurs groupes de travail ministériels et de comités consultatifs, dont le Groupe de travail sur l'industrie de la pétrochimie qui a présenté son rapport au gouvernement en février 1983. Le Comité consultatif de l'industrie forestière (CCIF), pour sa part, a soumis, en août 1983, un rapport provisoire sur les problèmes actuels de l'industrie forestière (CCIF), pour février 1984. Un Groupe de travail sur les produits forestiers a également été formé au sein du ministère en vue d'examiner en profondeur les principaux segments de l'industrie. Il doit terminer ses travaux au début du prochain exercice financier. En outre, au cours de 1983-1984, le gouvernement a préparé des réponses aux rapports de deux groupes de travail qui ont étudié des

sous-secteurs de l'industrie des services (le commerce de distribution et les services d'ingénieurs-conseils), et le groupe a réuni la documentation de base nécessaire à la création d'un comité consultatif permanent du commerce de distribution. Enfin, un Groupe de travail sur les secteurs du textile et du vêtement a été officiellement formé en février 1984.

Des mesures ont été prises afin d'améliorer la qualité du dialogue avec les grandes sociétés faisant partie des secteurs du groupe et afin d'accroître la compréhension de leurs plans stratégiques comme prélude à l'élaboration éventuelle de protocoles d'entente entre le ministère et les entreprises. À cet égard, les hauts fonctionnaires ont amorcé des pourparlers avec un certain nombre de sociétés.

Dans le domaine de la politique, des travaux préliminaires ont été entrepris concernant l'élaboration d'un cadre de politique stratégique pour les industries de services et la détermination des sous-secteurs de l'industrie des services susceptibles d'être désignés aux fins du PDIR. Le groupe a également tracé l'esquisse de divers secteurs : meubles de maison, brasseries, équipement de hockey, affinage des métaux précieux, conditionnement de la viande, articles de loisirs, formules commerciales, piscines et ustensiles de cuisine. Une étude du secteur sidérurgique a également été entreprise, ainsi d'ailleurs qu'une étude interministérielle sur les fondries de métaux non ferreux dont le but était d'examiner les besoins de l'industrie en matière de modernisation. Sur une autre scène interministérielle, le groupe a pris une part active dans les travaux d'un comité chargé de passer en revue la disposition de la Loi canadienne sur les brevets relative à la licence obligatoire et ont consulté les provinces et l'industrie privée sur les répercussions des diverses options en matière de politique. Il a participé, au nom du ministère, aux travaux du Groupe d'étude des exportations d'uranium et a fourni les données nécessaires à l'examen de la politique d'exportation d'uranium.

Pour ce qui est de la commercialisation au pays, un nouveau programme de marketing du genre "Magasins à la canadienne" dont l'élément essentiel est la participation du secteur privé a été mis sur pied. Cette politique a été élargie de façon à englober non seulement le marché de consommation, mais également les marchés industriels et institutionnels.

programmes du gouvernement et au soutien qu'il accorde à la planification du développement technologique et industriel de l'industrie de l'automobile.

La recommandation du groupe de travail prévoyant la perception de la taxe de vente fédérale sur le prix de gros des voitures de manière à éliminer les avantages fiscaux qui favorisaient autrefois l'importation de voitures a été adoptée dans le budget du 15 février.

Par suite des travaux du groupe de travail, le budget du programme d'adaptation de l'industrie et de la main-d'œuvre pour l'exercice 1983-1984 a été majoré de 15 millions de dollars, ce qui a eu pour effet de porter à 40 millions de dollars le fonds particulier du programme pour les pièces d'automobile. De concert avec l'industrie et les provinces intéressées, le MEIR est en train d'effectuer une étude complète de l'industrie des pièces d'automobile et d'établir une stratégie de portée générale touchant ce secteur. En ce qui concerne les ressources humaines, des programmes de formation et de recyclage sont actuellement offerts aux travailleurs de l'automobile par la CEIC de concert avec l'industrie et le Syndicat des travailleurs unis de l'automobile dans le cadre d'ententes sur les services consultatifs de la main-d'œuvre. La CEIC et l'industrie effectuent aussi conjointement une étude sur les ressources humaines qui porte sur les tendances de l'offre et de la demande de main-d'œuvre.

BIENS DE CONSOMMATION, SERVICES ET TRANSFORMATION DES RICHESSES NATURELLES

Le Groupe des biens de consommation, des services et de la transformation des richesses naturelles comprend six directions générales :

- la Direction générale des industries de la transformation des richesses naturelles;
- la Direction générale des produits alimentaires et des produits de consommation;
- la Direction générale des industries des services;
- le Bureau de l'adaptation industrielle;

Le secteur est également responsable du programme de productivité de l'industrie du matériel de défense (PPIMD), du programme d'aide aux constructeurs de navires (FACN), ainsi que du programme de la machine.

Le PPIMD, qui a pour objet de fournir l'aide financière nécessaire à la recherche et au développement, à la détermination des sources d'approvisionnement et à la modernisation des usines dans les divers secteurs de l'industrie de la défense, a continué de jouer un rôle important puisque l'aide offerte a totalisé quelque 144 millions de dollars. Quant à l'aide accordée dans le cadre du FACN, elle s'est élevée à 77,4 millions de dollars pour l'année et, en raison de l'élimination des subventions à la construction de navires, des lignes directrices et un règlement nouveaux ont dû être rédigés.

Le programme de la machine prévoit des subventions pour le développement industriel de manière à inciter les fabricants de machine à tirer le plus grand parti possible des dispositions tarifaires, d'une part, et, d'autre part, à aider les utilisateurs de machine à faire l'acquisition de matériel de production perfectionné au meilleur coût possible en offrant des remises de droits sur les pièces d'équipement qui ne sont pas fabriquées au Canada.

En 1983-1984, 14 200 demandes de remise de droits de douane ont été présentées dans le cadre du programme. Pendant cette période, environ 250 entreprises ont bénéficié de remises qui ont représenté des économies nettes d'environ 370 millions de dollars pour les utilisateurs de machine dans toutes les industries. Ces remises de droits de douane ont permis d'accroître la production canadienne de 1,2 milliard de dollars et de créer quelque 15 000 nouveaux emplois directs. En 1983-1984, le programme de la machine a aidé 22 entreprises à élargir leur gamme de produits fabriqués au Canada. On a en effet commencé à fabriquer 21 nouvelles séries de produits jusqu'alors importés, ce qui a permis au secteur manufacturier d'augmenter son chiffre d'affaires de 27 millions de dollars des la première année et de créer plus de 200 nouveaux emplois.

Le 19 mai 1983, le Groupe de travail sur l'industrie de l'automobile présentait son rapport au ministre Lumley. Le 15 août 1983, le ministre y réagissait pour la première fois en acceptant un certain nombre de recommandations liées au perfectionnement des ressources humaines, aux

Biens d'équipement et biens industriels

normales, le Secteur des biens d'équipement et des biens industriels s'est vu confier la tâche de créer un fonds spécial dans le cadre du PDME pour la réalisation d'études de faisabilité dans le domaine du transport urbain.

Conformément à son mandat concernant le développement du commerce, le Secteur des biens d'équipement et des biens industriels a amorcé des consultations avec un certain nombre de grandes entreprises en vue d'obtenir du gouvernement le soutien nécessaire à l'essor stratégique de ces entreprises au Canada. Ces consultations ont abouti pendant l'année notamment à la signature d'une entente sur la croissance de l'entreprise conclue avec la société Pratt & Whitney Canada, laquelle prévoit le financement de douze nouveaux programmes de recherche, de développement et d'accroissement de la productivité. Ces programmes fourniront de l'emploi à quelque 6 000 personnes dans le domaine de la haute technologie et permettront de réaliser des ventes supplémentaires de 20 milliards de dollars.

Le secteur est aussi intervenu dans le projet de construction par la société Bell Helicopter d'une usine de fabrication de bi-réacteurs légers à Mirabel, au Québec. La société Pratt & Whitney Canada consacrera 252 millions de dollars à la conception d'une famille de nouveaux moteurs pour les hélicoptères qui seront fabriqués au Canada par la société Bell. Le projet de la société Bell et ceux de la société Pratt & Whitney Canada permettront de créer 3 775 emplois en moyenne chaque année dans ce secteur de haute technologie et de réaliser des ventes de 9,9 milliards de dollars au cours des vingt prochaines années.

Un protocole d'entente a aussi été signé avec la société Messerschmitt-Bölkow Blohm GmbH (MBB) de la République fédérale allemande prévoyant l'affectation de 72,6 millions de dollars à la mise au point et à la fabrication au Canada de bi-réacteurs légers. Ces hélicoptères seront construits à Fort Erie, en Ontario, dans le cadre d'un projet conjoint avec la société Fleet Industries. Au cours d'une période de vingt ans, le projet devrait susciter des ventes d'environ 1,3 milliard de dollars et amener la création de quelque 760 emplois permanents.

Le Secteur des biens d'équipement et des biens industriels a en outre dirigé une série de discussions avec Transports Canada, VIA Rail, la société Bombardier, la Société Ontario Northland transport urbain, le gouvernement ontarien en vue de créer deux nouveaux programmes de conception de matériel ferroviaire pour les trains de passagers.

régionales provenant d'approvisionnements gouvernementsaux importants. La nouvelle Direction de l'approvisionnement du secteur public du BRIR administre des programmes de retombées industrielles liés aux grands projets d'approvisionnement du gouvernement, surtout dans le domaine du matériel de défense. A cette fin, elle établit les objectifs concernant les retombées industrielles et régionales, évalue et classe les soumissions des entrepreneurs, négocie le contenu canadien et les retombées, et administre le programme des retombées industrielles une fois les contrats adjugés afin de s'assurer que les engagements ont été respectés.

L'autre modification importante apportée au mandat du BRIR découle des mesures récentes du gouvernement visant à accroître sa domination au large des côtes et à promouvoir les possibilités en matière d'industrie et d'emploi qui résulteraient de la mise en valeur des ressources off-shore. Ces mesures englobent l'élargissement de la Loi canadienne sur les douanes et la taxe d'accise pour qu'elle s'applique au plateau continental, l'adoption de mesures visant à favoriser la construction de navires, y compris l'adoption de nouveaux tarifs pour les plates-formes de forage et les navires de ravitaillement, ainsi que le projet d'élargissement de la loi sur le commerce ayant trait aux ressources au large des côtes.

Dans le domaine de la promotion des exportations, le Secteur des biens d'équipement et des biens industriels a appuyé la participation du Canada à un certain nombre de salons, de missions et de colloques internationaux d'importance primordiale et a fourni les ressources humaines nécessaires sur place. Ce secteur a en outre coordonné et favorisé la participation de fabricants à des projets d'immobilisation de grande envergure à l'étranger et a répondu à des demandes de renseignements sur les sources d'approvisionnement.

Dans le domaine du transport urbain, ce secteur a joué un rôle de chef de file lorsqu'il a réalisé, par l'entremise d'équipes de projet créées expressément à cette fin, un projet pilote interministériel prévoyant la détermination rapide et le suivi des grands projets d'exportation. De plus, le Secteur des biens d'équipement et des biens industriels a continué de participer activement au programme de développement des marchés d'exportation (PDME) qui a pour objet d'aider les entreprises à trouver et à exploiter de nouveaux créneaux pour leurs produits sur les marchés étrangers. En plus de ses responsabilités

BIENS D'ÉQUIPEMENT ET BIENS INDUSTRIELS

La dernière étape de la réorganisation a été amorcée au cours de l'exercice financier. Cette réorganisation prévoit les changements suivants : en premier lieu, fonder quatre directions de secteurs industriels et le Bureau de développement économique et commercial en trois directions générales (électronique et aérospatiale, transport routier, maritime et ferroviaire, machinerie et équipement électrique), créer le Bureau de l'innovation industrielle et restaurer le Bureau des retombées industrielles et régionales de façon à ce qu'il englobe la responsabilité des retombées industrielles découlant des approvisionnements importants du gouvernement; en deuxième lieu, réduire l'effectif de quelque 400 employés à un peu plus de 300; en troisième lieu, réorienter le mandat du secteur pour que les activités nécessaires à l'essor du secteur industriel et des entreprises se déroulent d'avantage suivant une stratégie précise.

La Direction générale du développement des marchés a été intégrée au Groupe des biens de consommation, des services et de la transformation des richesses naturelles.

Malgré la restructuration, la reconstitution des effectifs et la réorientation du mandat du secteur, les directions générales se sont efforcées de maintenir la qualité et le volume de leurs activités, dont beaucoup ne sont pas touchées par des pouvoirs discrétionnaires et répondent aux besoins d'entreprises, d'autres ministères et de ministres.

Ces activités englobent la tenue à jour de renseignements sectoriels, le maintien des connaissances sur les progrès technologiques et l'innovation, la participation à l'établissement des annonces de politique du ministère, la réalisation d'activités liées à la commercialisation des exportations (p. ex., foires et missions, détermination de sources d'approvisionnement et de débouchés), ainsi que de la mise en œuvre de programmes, la prestation de services à d'autres ministères et organismes, la négociation de plans d'approvisionnement au Canada avec les promoteurs de grands projets, la mise en œuvre d'ententes sur les retombées industrielles, l'information des ministères et la correspondance.

Le Bureau de l'innovation industrielle a été créé pour s'occuper de la planification stratégique des politiques et des programmes touchant l'innovation. À cette fin, il reconnaît toute l'importance de consulter le secteur privé et d'autres ministères et d'entretenir avec eux des liens étroits. Le Bureau s'emploie actuellement à établir un aperçu de la position du ministère par rapport aux progrès technologiques, à déterminer l'efficacité du transfert de technologie du gouvernement à l'industrie, ainsi qu'à élaborer des stratégies concernant la technologie CFAO et l'implantation de nouveaux centres de technologie.

De plus, le Bureau de l'innovation industrielle est en train de mettre sur pied un service d'évaluation des nouvelles technologies et des progrès technologiques dont le Canada pourrait tirer grand profit sur le plan commercial. L'évaluation portera surtout sur les aspects des progrès technologiques qui influent sur la capacité d'innovation des entreprises canadiennes par l'exploitation et la conception de nouvelles technologies.

Le Bureau des retombées industrielles et régionales (BRIR) a été créé pour aider les entreprises canadiennes à tirer pleinement parti des possibilités offertes par les grands projets réalisés au Canada. Il doit consulter le secteur privé sur des questions industrielles et régionales se rattachant à ces projets, collaborer étroitement avec les gouvernements provinciaux pour favoriser les retombées industrielles et, par l'entremise de l'Administration du pétrole et du gaz des terres du Canada, conseiller le gouvernement fédéral au sujet des dispositions relatives aux retombées industrielles de la Loi sur le pétrole et le gaz naturel du Canada.

Le Bureau consulte les propriétaires et les promoteurs de projets de grande envergure de manière à s'assurer que les entreprises canadiennes sont en mesure d'exploiter pleinement et équitablement les possibilités offertes par de tels projets. Il encourage les promoteurs à établir des politiques d'achat conformes aux objectifs du gouvernement liés aux retombées industrielles et régionales et à mettre en place les structures organisationnelles nécessaires à l'application de ces politiques. Il aide aussi à déterminer les secteurs où le Canada soutient le mieux la concurrence ainsi que ceux que les promoteurs devraient mettre en valeur en raison de leur potentiel.

En 1983-1984, le mandat du Bureau a été élargi de manière à englober les retombées industrielles et

LES ACTIVITÉS DANS LA RÉGION DE LA CAPITALE NATIONALE

Pour plus de clarté, les principales activités du nouveau ministère ont été regroupées selon le centre de responsabilité, bien qu'il y ait habituellement une grande interaction entre les divers éléments.

I N T R O D U C T I O N

L'exercice financier 1983-1984 a été marqué par la création du ministère de l'Expansion Industrielle régionale (MEIR) et par l'adoption, par le Parlement, d'une loi instituant le programme de développement industriel et régional du ministère.

Le nouveau ministère, dont la structure a été entièrement modifiée, est le résultat final de la décision du gouvernement, en 1982, de fusionner les éléments des ministères de l'Industrie et du Commerce (MC) et de l'Expansion économique régionale (MEER) en une seule entité, alliant ainsi l'expérience des secteurs industriels du premier et celle acquise par le second dans la mise en œuvre à l'échelle régionale des programmes d'aide financière du gouvernement fédéral.

La réorganisation a permis de constituer au siège central six secteurs, chacun relevant d'un sous-ministre adjoint ou de son équivalent, et cinq unités de services : les Ressources humaines, les Communications, la Vérification interne, le Contentieux et le Bureau de coordination générale.

Des bureaux régionaux et des bureaux de district dynamiques, dirigés par des directeurs exécutifs régionaux, ont été établis dans chaque province et territoire, afin d'assurer la sensibilisation locale à l'élaboration et à la mise en œuvre des programmes.

La Loi sur le programme de développement régional et Industriel (PDIR) a permis de regrouper des éléments de sept anciens programmes du MC et du MEER, fournissant aux entreprises canadiennes un programme plus simple et plus rationalisé, conçu comme un "comptoir unique".

Comme en fait foi le texte qui suit, l'exercice financier 1983-1984 a permis au nouveau ministère d'administrer à la fois les anciens programmes et le nouveau PDIR.

Bien qu'officiellement le nouveau ministère n'ait été en place que depuis le milieu de l'année à l'étude, le présent rapport annuel reflète l'organisation existante au 31 mars 1984, ce qui en simplifie la présentation.

Toutefois, conformément aux exigences du Parlement, les états financiers des trois ministères figurent séparément.

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Son Excellence,
La très honorable Jeanne Sauvé, C.P., C.C., C.M.M., C.D.
Gouverneur général du Canada

Votre Excellence,

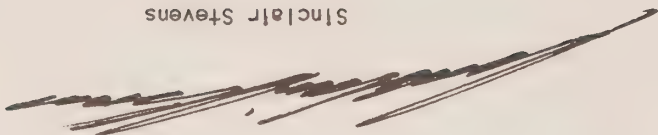
J'ai l'honneur de présenter à Votre Excellence
les derniers rapports annuels combinés des ministères de
l'Expansion économique régionale et de l'Industrie et du
Commerce, ainsi que le premier rapport annuel du nouveau
ministère de l'Expansion industrielle régionale.

Votre Excellence trouvera dans ces rapports, sous
les rubriques appropriées, un résumé des réalisations des
ministères.

Je vous prie d'agréer, Votre Excellence,
l'expression de ma très haute considération.

Le Ministre de l'Expansion
industrielle régionale,

Stclair Stevens



RAPPORTS ANNUELS 1983-1984

Ministère de l'Industrie et du Commerce,
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Gouvernement
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Expansion industrielle
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Regional Industrial
Expansion

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Ministre
Sinclair Stevens

AUG 13 1986

